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ABSTRACT

This guidebook, which is intended for educational professionals who are seeking to establish liaisons with business partners and provide workplace education to the health and manufacturing industries, contains strategies and issues that workplace education program administrators and instructors should consider when designing and delivering onsite educational training. Developed on the basis of extensive literature and documentation reviews, interviews with key educational and industry personnel, and observations, the guide's seven chapters covers the following topics: Business and Professional Development Institute Project; starting a partnership; assessing need; principles of adult education applied to work force education; organizing instruction and customizing the curriculum; learner assessment and program evaluation; and strategies for providing support for workplace literacy. Twenty-five forms, graphics, and tables are included. The bibliography lists 27 references. Appendixes constituting approximately 60% of this document contain the following: sample survey reports; training outlines/schedules; workshop session outlines; instructional materials on decision making, brainstorming, memo writing, calculation; and reporting problems; assessment materials; and assessment and outcome forms. Also included is the text of a presentation, "Workshops in the Workplace" (Claude D. Grant, Natalie Hannon, Doris D. Dingle), that was made to a 1997 symposium on workplace education in the health care environment. (MN)

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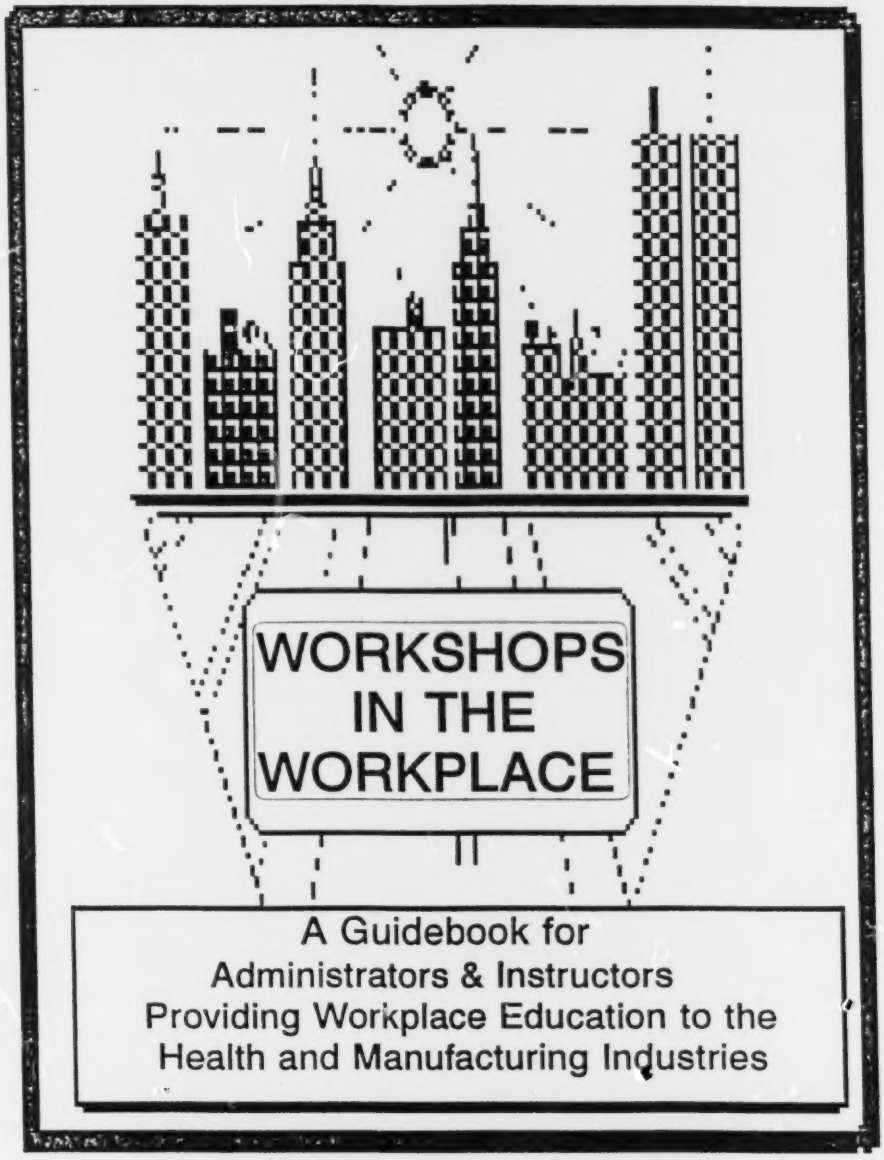

A Guidebook for
Administrators & Instructors
Providing Workplace Education to the
Health and Manufacturing Industries

BRONX COMMUNITY COLLEGE
THE CITY UNIVERSITY OF NEW YORK

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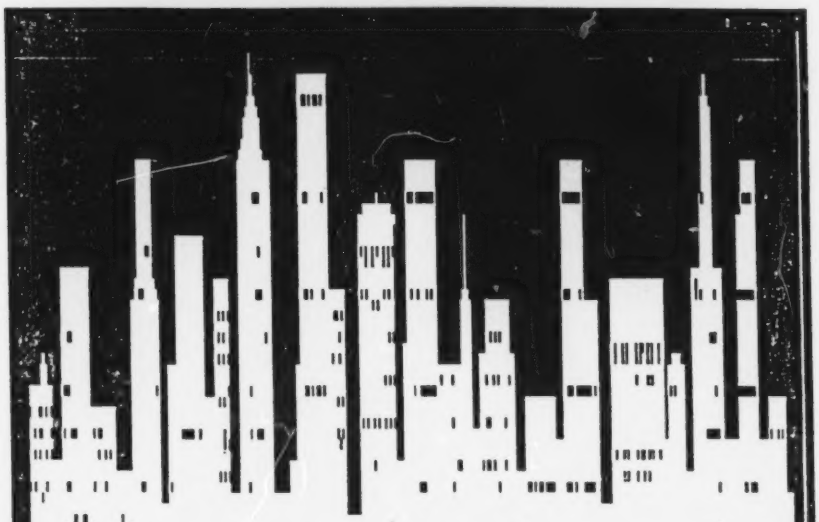

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WORKSHOPS IN THE WORKPLACE:
A Guidebook for Administrators and Instructors Providing Workplace Education to the Health and Manufacturing Industries

THE BUSINESS & PROFESSIONAL DEVELOPMENT INSTITUTE
Bronx Community College
The City University of New York

Mr. Claude D. Grant, Director

Guidebook Funded by: U.S. Department of Education,
National Workplace Literacy Program

Handbook Developed and Designed by:
Jeanne E. Bitterman, Ed.D.

1995

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It is hoped that this **Guide** will provide a framework for those involved in, or wishing to embark upon, workforce education in manufacturing and health using some of what are considered unique approaches to training methodology in these areas. All of the approaches and techniques outlined herein are not necessarily expected to be used as is, but to be customized to the individual work situation.

Acknowledgments are extended to the following individuals who have been instrumental to the success of the project:

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Ms. Lena Townsend, Evaluator/The Institute for Literacy Studies, Lehman College
Dr. Natalie Hannon, Director of Training/Bronx Lebanon Hospital Center
Mr. Oliver Lednicer, President/Kruysman, Inc.
Mr. Dennis Palmer, Director of Manufacturing/Farberware, Inc.
Mr. Patrick Kelly, Vice President/Cox & Company, Inc.

Inquiries regarding this project can be directed to:
Claude D. Grant, Project Director
The Business & Professional Development Institute
Bronx Community College, PH-14
West 181st Street & University Avenue
Bronx, New York 10453
Phone: (718) 289-5174
Fax: (718) 289-6018
e-mail: 71211.3721@compuserve.com

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Goals

Over the past few years as America has become increasingly concerned with remaining globally competitive there has been growing attention paid to the need for American workers to improve their literacy, educational, and employability skills.

The United States Department of Education's (DOE) National Workplace Literacy Program was established to help address this need. In recognition of the role and expertise educational institutions have in providing this training the DOE and the National Center for Adult Literacy designed a grant program to establish on-site basic educational training.

In looking around at the current literature on designing and delivering workplace education programs, it becomes quite clear that there is a gap in the availability of usable materials for the educational professional seeking to establish such programs. There is a paucity of materials that combine the philosophical underpinnings of the fields of basic literacy and adult education with the practical experience of delivering workforce programs. There are too few materials that are also brief enough to spare the educator having to research and access many different academic resources and texts.

The Business and Professional Development Institute (BPDI) of Bronx Community College, one of the grantees under the DOE Workplace Literacy Project, came to the realization that the expertise and professional wisdom gained through the experience of delivering workplace training through this ***Workshops in the Workplace*** grant in particular (and its other past programs) are worthy of dissemination. Hence came the conceptualization for this guidebook.

The guidebook is therefore developed for educational professionals at other institutions who are seeking to establish liaison with business partners in order to provide workplace education literacy programs. The goal of the book is to offer the reader a manual of strategies and issues to consider in the design and delivery of effective on-site educational training. The book was developed using a modified qualitative research methodology - incorporating extensive reviews of the literature and documentation, interviews with key personnel (both with the project personnel and the manufacturing and healthcare partners) and through observations.

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What's Included

The manual is not an overall "how to" book - for it is the experience of BPDI and all quality programs that success is largely dependent on the ability of the designers to tailor or customize their services to the particular work site.

More often than not, throughout the guidebook literacy training will be referred to as workforce education - it is also the experience of BPDI that basic literacy has the negative connotation of minimal functional level. The employees encountered through this project and in other business partnerships have varied greatly in their levels of proficiency and competencies; they did however share some basic needs for improved communication, critical thinking and problem-solving skills. The skills and strategies found to be successful in the training program are therefore generalizable; they transcend the traditional basic literacy content areas (reading, basic computation, writing, English as a Second Language/ESL) as well as the nature of the work-site (manufacturing, high-tech or hospital setting).

The guidebook includes seven chapters of varying lengths. Each chapter includes a summation with "Key Points" for the educator to consider.

Chapter One provides an Overview of BPDI, the DOE Workplace Literacy Grant and the Partnership Settings;

Chapter Two includes a discussion of How to Get Started - what components need to be established in order to ensure successful functioning;

Chapter Three includes a discussion and some sample materials on the Literacy Training Needs Assessment - the BPDI WESA - Workplace Educational Skills Analyses/Task and Literacy Audits. Sample forms are provided;

Chapter Four provides an overview of the prevailing Principles of Adult Education and how they can be applied to on-site workforce education;

Chapter Five provides an overview for Organizing Instruction and Customizing the Curriculum to meet specific emloyer-employee needs. Sample schedules of training and curriculum materials are included;

Chapter Six includes a discussion of individual and programmatic formative and summative assessment and evaluation - how one determines learning outcomes and the success of the program;

Chapter Seven addresses the need for supportive resources in educational training programs. It highlights: the projected Train the Trainer series; includes a brief discussion of The Future Outlook - the NWLIS (National Workplace Literacy Information) System; the Continuity of On-site Training; and concludes with Applications and Recommendations from the BPDI project experience.

There is a list of Bibliographic References, as well as Appendices that include the miscellaneous additional resource materials referred to throughout the text.

Jeanne Bitterman, Ed.D.

Background on BPDI

The Business & Professional Development Institute (**BPDI**) was established in 1986 under the auspices of the Office of Continuing Education, Grants and Development at Bronx Community College. It was specifically earmarked to provide a link between the College, business and industry. The Institute offers many different kinds of customized training and consultant services for both small and large businesses, major corporations, and hospital centers throughout the City's boroughs (the Bronx and Manhattan) and neighboring Westchester County.

BPDI has been referred to as a "consulting firm within the college." Over the past few years BPDI has generated over $3 million in grant monies. In addition to administering these grants it enters into direct contracts with employers to provide a variety of services.

Some of the training and consultant services that BPDI offers include: computer applications, truck maintenance skills and mechanics training, business and management skills, marketing seminars, machinist training, office skills training, blueprint reading, retailing skills training, Total Quality Management (TQM) training, team building, nurses aide training, LPN training, nurses exam prep training, training in the health careers, entrepreneurial training, and other programs.

The Institute has entered into contracts with such major corporations as Chase Manhattan Bank, Paragon Cable of Manhattan, Skorr Steel Company, Inc., etc. Since 1992, the Institute has also been engaged in TQM, Continuous Improvement, Work Simplification, Supervisory, and ISO 9000 training and consulting. Some of BPDI's consulting services include technology development (assessment & recommendations for hardware and software systems, facsimiles, audiovisual equipment, Integrated Systems Digital Networks, LANs, telecommunications equipment, etc.), business and marketing plan development, and seminar and course development.

BPDI also assists with configuring, installing and upgrading computer systems. In addition to its funded activities BPDI has offered ongoing on-campus training for managers, supervisors and other employees in such areas as: Starting Your Own Business, Spanish for Hospital Personnel, American Sign Language, Computer Applications, Income Tax Preparation, and more.

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The U.S.Department Of Education - BPDI Workplace Literacy Grant

BPDI's Workplace Literacy program, entitled "***Workshops in The Workplace,*** "receives its funding from a three year $938,765 grant from the U.S. Department of Education's National Workplace Literacy Program (NWLP). This is a public-sector program that has been specifically designated to fund partnerships between educational institutions and business, industry or organized labor. The purpose of these programs is to improve "productivity" of the workforce through the enhancement of literacy skills. The RFP (Request for Proposals) for the grant was aimed at on-site literacy training. Additionally, Congress directed the Department of Education to sponsor an independent evaluation of the programs granted under the NWLP to determine their effectiveness in

> "improving the literacy and basic skills of workers and the productivity of employees, including potential for the replicability or adoption of such programs" (P.L. 102-73).

[This evaluation project is discussed further in Chapters Six & Seven under NWLIS -the National Workplace Information System.]

Of more than 300 applications submitted for funding nationwide only 43 were funded. BPDI was funded partially because of its previous success rate with the US Department of Education and the National Workplace Literacy Program and because of its demonstrated expertise in delivering on-site workforce education.

At the time of this writing the first fiscal year of the three year grant is drawing to a close. BPDI, however, gained similar significant experience with workplace literacy in a previous DOE project conducted during FY93. In the more recent initiative BPDI provides workplace training at a major urban hospital and three very diverse manufacturing firms. They are described further below.

The ***Workshops in the Workplace*** project is designed to **train over 270 employees** - to enhance their "productivity" on the job through the improvement of English language, basic education, communication, problem-solving and motivational skills. Although the Secretary of Education has suggested that grantees serve no more than two businesses BPDI was granted to provide four different settings with educational training. New York City warranted this augmentation as it is in a severely threatened state with respect to both manufacturing and health care. The four partnership arrangements serve Bronx Lebanon Hospital and Farberware, Inc. in the Bronx (both of whom were served under a previous grant) and Cox and Company, Inc., and Kruysman, Inc. in Manhattan.

The current **project staff** is comprised of: a Project Director, Assistant Project Director, Lead Trainer, Associate Trainer, Instructors and Assistant Instructors (including bilingual assistants) as well as an Evaluator. All of the above have either helped develop or been oriented to the BPDI approach (see Chapter Two).

The project also was expanded to include not only initial staff training but supervisor orientations and **Train the Trainer** sessions, at the conclusion of the project (for approximately 40 individuals throughout the four sites) to ensure continuation of the project.

BPDI has developed an **original training methodology, custom designed curricula** (see Chapter Five and the Appendices), and has designed its own literacy audit and task analysis (see Chapter 3); it uses program prepared pre and post-tests for learner outcomes (see Chapter Six). All of these have been field-tested.

The ***Workshops in the Workplace*** project also includes an on-going **objective evaluation** component conducted by a "Literacy Evaluation Team" from the Institute for Literacy Studies at Lehman College, of the City University of New York (see Chapter Six on Assessment and Evaluation for a further discussion of this component).

Workshops in the Workplace serves participants who range in nationality from Puerto Rican to Russian; in educational level from minimal to post-secondary. Workshops are for the most part delivered in two-hour blocks of time, once weekly during the work day. Workshops are generally 30-36 hours in length. In the refinement of the Workshops project staff meet managers, supervisors and workers, as well as review written materials and perform task analyses (and observations of prospective trainees). At the end of a training cycle **"Certificates of Completion"** are awarded. In conjunction with the business partners **"Educational Resource Centers"** (see Chapter Seven) are established at the work site.

The Setting - Business Partners

Bronx Lebanon Hospital Center -

The Hospital Center is a large multi-service institution. It is a major employer in the Bronx with more than 3000 employees based in several different locations. The hospital is facing the same crisis as many different health care institutions across the country: lack of qualified health care staff, a loss of funds due to third party billing errors, and a shortage of personnel in general. The Hospital is concerned with upgrading personnel in the non-medical and low-end medical positions to ensure continuity of staff. Promoting from within assures some degree of loyalty, improves morale and eliminates some orientation-training needs.

The "Health Career Ladder," referred to above, includes vertical movement from nursing assistants to licensed practical nurses, and ultimately to registered nurses; similarly with the specialist areas there is a need for training for radiologists, occupational therapists, respiratory therapists, lab technicians and other support titles.

Many in-house personnel however do not have some of the basic skills required to continue health career study. In addition to those in the institution who may be able to fill the crucial shortage in direct health care other employees are lacking in the basic skills necessary to perform their present jobs. These workers include Food Service Employees, Security Guards, Ward Clerks and Nursing Assistants. The BPDI three year project targets serving over 75 employees.

Bronx Lebanon has a multicultural workforce consisting of, among others, Hispanics, Asians, Europeans, African-Americans, Caribbeans and South Americans. BPDI has worked with the Hospital Center over the past 4 years providing such training as: Communicating with the Hearing Impaired, Spanish for Hospital Personnel, Computer Applications, Intercultural Relations Training, and Workplace literacy.

The first cycle of ***Workshops in the Workplace*** training under this grant began with training designed for twelve counselors of the Methadone Clinic, all of whom were in need of better oral and written communications skills.

These employees are required to keep accurate psychosocial records on clients and the majority of them have had no formal social work training, having had to learn on the job. These counselors also need to communicate more effectively with their clients during interview sessions.

Cox & Company, Inc.

Cox & Company is a 48 year old manufacturing company with 140 employees. It manufactures temperature control and de-icing systems for airplanes. It is a world leader in the industry. It is located on the lower Westside of Manhattan. The corporation develops and manufactures a small line of high-tech equipment. The line includes production of customized technology in temperature control, primarily for the airline industry. In the past they have produced the B-18 Vane Electrical Heating system under the auspices of Rockwell Corporation. The company also produces window heat control units, fuel line heaters, toilet gasket heaters and other parts in highly patented processes. In the space shuttle alone the company produced over 450 components.

The company has a 4 year old facility of over 105,000 square feet. Personnel has at times ranged upwards of 300 individuals. Employees at Cox represent over 40 different nationalities. 50% of the stock is owned by the employees. Some of the customers of Cox & Company, Inc. include the U.S. Government, Boeing Aircraft and Air Bus. Job titles include Technical Electrician, Assemblers, Mechanical Inspectors, Supervisors and Cablers.

In the first cycle of training, Spring of 1995, fifteen employees completed a workshop series entitled Workplace English and Communications. This group was comprised of people from Eastern Europe, the Caribbean, South America and Asia. They needed improved English proficiency to improve their job efficiency. This first 30 hour workshop series consisted of communications and critical thinking training with an emphasis on reading, writing and computational skills (using a calculator).

Farberware, Inc.

Farberware is a 100 year old business which manufactures cookware and small appliances. It has more than 700 employees who are represented by the Teamsters' Union. Farberware enjoys an international market; it is located in the Port Morris Industrial Park, a designated Economic Development Zone, in the Southeast Bronx. The company is currently involved in the installation of new equipment and the development of new manufacturing processes. These new initiatives will require a range of upgraded skills from reading manuals to better understanding how to problem-solve (related to the new methods and equipment).

The Farberware workforce is also multicultural; 10 different languages are spoken. The most significant group is comprised of native Spanish speakers, many of whom do not possess adequate English language skills in reading, writing or oral comprehension. Employees must also learn how to read and understand graphics to stay abreast of developments at the company. Production workers, including welders, polishers, trademark operators, press operators and forklift operators, all need upgrading of their current skills. Seventy-five employees are projected to be served through the three year project. BPDI has worked with Farberware since 1987 providing enhancement of production worker machinery skills, as well as providing supervisory training, team building and workplace literacy.

The first cycle of training targeted 13 employees who were receiving problem solving, critical thinking and team development training in conjunction with their reading,writing and computational upgrading. These trainees did not have an English language problem. They were however designated to begin functioning in **"manufacturing teams"** in the new companywide **quality management model.** They needed upgrading of their communication skills.

Kruysman, Inc.

Kruysman is a 53 year old company which manufactures filing products, such as expandable folders, lawyers' brief holders, file folders, specialty binders and so on. The company is located on the lower Westside (Tribeca) of Manhattan. It is a small business which employs over 250 individuals, 80% of whom are Latin and Hispanic women. Overall the workforce is 95% Hispanic. These employees represent both Latin and South America. The competition in this area of manufacturing is extremely strong and the CEO of Kruysman has acknowledged the need to upgrade the workforce to remain globally competitive. Oliver Lednicer, CEO, called upon BPDI to provide an initial 3 month program on Work Simplification and Quality Management for supervisors of the company. BPDI has also provided this company with other supervisory and team building training.

The majority of workers at Kruysman are not literate in English (frequently neither are they in their native language). The company is revising many of its manufacturing methods and equipment and realizes that employees will need to be able to read and adjust to new procedures. The trainees for the overall three year project will be production workers (sewers, gluers, assemblers, cutters, etc.). Along with reading and writing and computational skills Workplace English will be emphasized. Sixty production workers in key positions, identified by their English proficiency, will be trained. The first cycle of the three year project targeted sixteen employees who received training concentrated on reading, writing and oral communications. The next series began a 30 hour training in team building. The theme entitled "Try English First" was developed by trainees.

Key Points of Chapter One

BPDI's *Workshops in the Workplace* Project

1) BPDI has a long and successful track record of business and partnership arrangements;
2) BPDI has extensive background and content area expertise in basic literacy and workforce education training delivery;
3) The DOE workplace literacy grant, in acknowledgment of how jeopardized the fields of manufacturing and healthcare are in New York City includes functional problem-solving, team building and decision-making skills in its definition of basic literacy;
4) All of the partners have recognized the positive relationship between workforce education upgrading and maintaining and increasing economic viability.

THE BPDI WORKSHOPS IN THE WORKPLACE PARTNERSHIP

BRONX LEBANON HOSPITAL CENTER

COX & COMPANY, INC.

THE BUSINESS AND PROFESSIONAL DEVELOPMENT INSTITUTE

FARBERWARE,INC.

KRUYSMAN, INC.

Establishing the Partnership

It has sometimes been implied that the business problems of lost and potential losses in revenues due to the poor literacy skills of employees could be avoided through better or more careful personnel procedures; it has however become clear to most corporations and institutions that as technology changes workplace organizations must continue to retrain and upgrade the skill level of most of their employees.

As mentioned earlier negative attention has been focused on the notion of "illiteracy" or "functional illiteracy" of the less academically skilled and fluent worker populations. Most successful workforce education programs recognize the imperative to not only adjust to the training needs of this population but to improve their abilities to take advantage of likely needed future training as well.

In general ***workforce literacy*** or ***workplace fitness*** (as BPDI has come to call it) implies an interrelationship of basic skills, knowledge and attitudes, a complexity of abilities, and a willingness to process new knowledge and new information. Technical training and basic skills training can be successfully integrated when they are refocused for content-oriented workplace functioning. Sticht & Hickey state that it is widely acknowledged by all parties involved that:

> *we need to move beyond the piecemeal intrusion of the basic skills specialists into the content classroom, to the recognition of the potential of new understanding of human cognition and new communications technologies for designing totally new programs of instruction that will facilitate learning across a wide spectrum of abilities.* (1987, p. 197)

The business partners in the BPDI ***Workshops in the Workplace*** grant and those in the past programs have all acknowledged some general need amongst employees for a more customized upgrading. Because of BPDI's intimate working relationships with business and industry BPDI enjoys a solid widespread reputation. In general its partnerships have been developed through the requests of employers. The need to market such programs while real was not of immediate concern in the ***Workshops in the Workplace*** grant.

With respect to the current DOE grant, the business partners were already familiar with BPDI and saw this project as an exceptional opportunity for their respective organizations. As a result management was most cooperative and willing to extend themselves as necessary to ensure project success.

Therefore, this guidebook does not address marketing strategies and techniques for making business, industry and health organizations aware of education's abilities to meet in-house workforce training needs. Instead, the book focuses on how to proceed once the contact is made.

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As soon as contact is made the project must work out with the partner what services will be provided, what realistic outcomes can be anticipated and what the responsibilities of the business partners will be. Clearly, the higher up the contact person is in the work organization the more likely the promises of cooperation will be kept. Initial business responsibilities must be enumerated and agreed upon.

Preliminary Responsibilities of the Business Partner include:

- -providing company liaison(s) to facilitate access, space allocation and scheduling;
- -providing access to employees, managers and supervisors for observations, literacy audits and task analyses;
- -providing suitable training space with any necessary equipment (such as flip charts, white or blackboards, overhead projectors, VCR with monitor, etc.);
- -selecting a regular liaison to attend monthly Steering Committee meetings;
- -selecting employee(s) to represent fellow workers at "special" Steering Committee meetings;
- -encouraging supervisors to support employees in their training efforts;
- -identifying space and providing support for an on-site "Education Center" (potentially providing a literature rack, facsimile, phone availability, etc.).

For the four partnership arrangements in the BPDI Workshops in the Workplace project the contact individuals include:
from healthcare - the Director of Training and Personnel at the Hospital Center and a Program Administrator at the clinic being served in the first cycle of training;
from manufacturing - one Director of Human Resources and Administration, one Director of Personnel, a Human Resources specialist and a Plant Manager.

Startup Time

While time is always an issue, it is the experience of BPDI that allowing for sufficient startup time is one key to effective delivery. Sufficient lead time circumvents many of the common problems that arise during project delivery (those caused by conflicting objectives, miscommunications or inappropriate personnel). Building in adequate startup time affords the clarification of objectives, the establishment of a cooperative working relationship, the acquisition of appropriate personnel, and the orientation and training of project staff to program philosophy and methodology. The DOE funded ***Workshops In the Workplace*** literacy project began with a three month startup period (11/1/94-2/1/95), followed by a five month training period, followed by two months to revise, adjust, modify and initiate changes.

Startup Time

- -clarify objectives
- -establish collaborative environment
- -acquire, orient & train project personnel

The Steering Committee

In order to ensure the success of the program there must be the creation of a consistent Steering Committee. This committee meets a minimum of once monthly and is comprised of number of individuals.

The Steering Committee Participants

- - the representative of the business partner
- - key workforce education project personnel
- - the objective independent evaluator

This committee works cooperatively exchanging ideas, discussing problems and contributing to the overall development and delivery of the training.

It acts as an ongoing advisory group throughout the duration of the project. At meetings participants strategize, develop plans, revise and create materials, schedule, etc. The Steering Committee can be extremely effective in monitoring implementation of the program and assuring employee participation. However, some **basic guidelines need to be established**.

Success depends not only on the employers' attitudes toward the training but the employees' as well. While the CEO or Director of Training might support the project it is important that this get carried down to the participant's immediate supervisor. **Training should be accomplished during the employee's work day.** Frequently, however, when training involves on-the-job release time an unwitting conflict is created. Supervisory support is vital for positive employee morale and motivation.

Employees need to be assured that their jobs are not at stake through participation in the program. When employees know or sense that training is a weeding out process there is a negative correlation to learner outcomes. Training also has to be kept relevant (Spikes & Cornell, 1987).

The Steering Committee can also continuously review and revise the congruence and viability of expected program outcomes. Clearly stated objectives, both with respect to the organizational outcomes as well as the employees' educational training outcomes, are essential.

A listing of some of the more generic expected outcomes of the ***Workshops in the Workplace*** Project follow. These objectives can be generalized to any workforce education - workplace literacy - workplace fitness program.

Workforce Literacy Objectives:

-improved employee understanding of job functions,
-enhanced employee accuracy and productivity,
-customized curricula for specific job sites (which can be replicated for new trainees in subsequent cycles),
-improved labor/management relations at work sites,
-educational advancement of employee participants,
-enhanced employee critical thinking and problem-solving abilities,
-orientation and training of Trainers (for supervisors & managers) at sites (to foster ownership of the project and to allow for post DOE funding continuation),
-improved employee reading, writing, computation and communication skills,
-increased usage of English on the job and enhanced English vocabulary skills of trainees,
-enhanced oral communications between workers & supervisors,
-improved potential for upgrading of trainees,
-improved awareness of career & vocational options for trainees,
-increased ability to utilize educational resources by trainees.

Finally the Steering Committee must monitor the establishment and utilization of the **Educational Resource Center.** This Center should ideally include a computer and other training support materials. Trainees must be given access to counselors, academic and vocational advisors, career development counseling; a successful literacy/workforce education program promotes educational-vocational awareness and opportunity and enhances the individual's self-directed search for lifelong learning.

Guidelines for Implementation

-provide release time for training,
-monitor positive supervisory-employee attitude towards the training,
-define clearly stated program objectives,
-define clearly stated learner objectives,
-ensure job retention after training,
-maintain relevancy of training,
-provide educational resource support and information Center.

Identifying & Developing Project Staff

Methods for hiring and training personnel abound in the literature of higher, adult and continuing education. As this guidebook is not meant as an orientation to program administration nor as a handbook for new adult education administrators it will focus only on those aspects of the workplace context that require special attention.

In addition to the traditional methods of selecting and hiring content area experts for the delivery of educational training programs it is critical to the success of any workplace literacy or workforce education program that project staff be willing to work cooperatively, be flexible, responsive to a complex environment, embody a basic respect for the adult learner-worker and have excellent human relations skills. Other additional documented qualities of effective staff include being able to: demonstrate sincere interest in both the subject and learners, facility with varying communication processes, willingness to invest significant time in preparation of materials and training sessions, enthusiasm for what is being taught, willingness to work with learners to solve problems (Henschke, 1987).

Ideal Qualities of Workplace Literacy Staff

- **content area expertise**
- **flexibility**
- **willingness to work cooperatively**
- **familiarity with adult education techniques**
- **possession of excellent human relations skills**
- **receptivity to specific project training**
- **familiarity with workplace demands and environments**
- **willingness to problem solve with students**

In the BPDI Workplace Literacy Project the Project Director and Assistant Project Director both have extensive backgrounds in delivering workplace programs as well as in teaching. Both the Lead Trainer and Associate Trainer possess doctorates and are not only content area experts but also highly experienced workplace education designers and instructors. The staff works as a team to assess site needs, develop curricula and train other project staff (as well as respective assigned worksite personnel).

Staff must be sensitized to the special needs of adult learners functioning in their particular on-site settings. Project personnel must also be oriented and trained in the program deliverer's approach, at BPDI a modified "Functional Context Approach" is used.

BPDI uses ***The Functional Context Approach*** - FCT (Stich & Hickey, 1987) to develop, deliver and assess training. [FCT originates from a Ford Foundation sponsored project that was designed to show how basic skills and technical skills could be integrated successfully in Electronics Technician training.] All project staff are apprised of the methodology to ensure idealogical compliance before proceeding with actual training. The three month startup time for this particular **Workshops in the Workplace** (DOE funded literacy project) allowed for training personnel in the Approach and for the development of appropriate site specific materials.

This approach refers to teaching skills applications as they are actually used on the job. BPDI uses actual job materials and simulations to teach basic oral, reading, writing, computational, and reasoning (critical thinking/problem solving) skills. **Curricula** is developed around actual forms, duties and responsibilities, as well as employee concerns, inherent at each worksite. BPDI personnel work as a team with the business partners' designees to review related procedures and materials for the jobs identified to be integrated into the general academic curricula.

There are seven components of the

Functional Context Literacy Training Approach

(they are described further in this guidebook):

-identifying critical tasks
(see Chapter 3)
-conducting literacy task audits
(see Chapter 3)
-conducting needs assessments
(see Chapters 3 & 6)
-planning and developing functional literacy curricula
(see Chapter 5)
-scheduling recruitment and instruction
(see Chapter 5)
-delivering the instruction
(see Chapter 5)
-evaluating outcomes
(see Chapter 6).

After the thorough Task Analyses and Literacy Audits are completed individual instructors meet with trainee participants at the beginning of training to jointly develop **Workplace Fitness Plans** (contained in Chapter 3).

These are similar to the development of IEPs (Individual Educational Plans) in public education, but are more specific to the workplace setting. The plans include personal education as well as job specific training goals.

Project Staff Meetings and Staff Development

In addition to Steering Committee meetings on-site the workplace literacy project staff continue to meet formally (& informally) throughout the training project, at least once per month. These administrative and staff development meetings are used to review: the appropriateness of curricula, the functioning of the project sites, the compliance of the business partners, the satisfaction of employees, and with the assistance of the evaluator to assess any needs for ongoing modification, etc.

These monthly meetings serve as staff development meetings and the process of this ongoing staff training has been called "Train-The-Trainer." Project staff collaborate not only on enhancing their personal skills but on the effectiveness of the curriculum. "Train-the-Trainer" forms are prepared, shared and revised.

The Task Analysis and Literacy Audits from the worksites are broken down into: instructional Sub Tasks, the Relevant Skills and the Higher Order Skills required. A sample of one of these Train-The-Trainer forms for a Methadone Maintenance Module in "Filling Out an Incident Form" follows "Key Points"; it concludes this chapter. Further discussion of project staff development and worksite "Train-the-Trainer" is found in Chapter Seven.

Key Points of Chapter Two

Starting Up The Project

1) Obtain Organizational Support For Workforce Education Training
   -seek high level support for the training program
   -maintain regular contact with business partner to ensure ongoing support for the program
   -collaborate on viable objectives at outset
   -obtain appropriate instructional space
   -assure release time for employees
2) Allow Sufficient Startup Time for the Project
3) Establish and Maintain a Steering Committee
   -conduct monthly meetings to monitor training progress
   -ensure relevancy of training curricula
   -assure supervisory support for employee training
   -secure Educational Resource Center space and support
4) Recruit, Train and Orient Appropriate Personnel
   -secure project personnel who have content expertise
   -ensure that personnel are trained in adult education philosophy and methodologies
   -hire and train personnel who are willing to collaborate in the program deliverer's Functional Context Approach
   -recruit personnel with excellent human relations skills willing to work in complex environments
5) Meet regularly with project staff to motivate, develop and improve project personnel and the program

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WORKSHOPS IN THE WORKPLACE
Methadone Maintenance Module
Filling Out an Incident Form

TRAIN-THE-TRAINER SAMPLE

SUB TASKS	RELEVANT SKILLS	HIGHER ORDER SKILLS
1. Identify the incident	1. Knowledge of what incident needs reporting	1. Compare and contrast the exceptional behavior of the client
2. Write the client's name, residence, date and time in spaces provided	2. Writing Skills: Record relevant data on the form	2. Recognize relevant pieces of information
3. Record the length of time, witnesses and other data on the form	3. Using occupation specific math: determine approximate time	3. Stating general impressions of the incident as it relates to clinic norms
4. Describe client's activity prior to the incident	4. Write time in minutes	4. Oral communication to summarize information
5. Communicate orally with other staff to collect more incident information	5. Identify words and meanings along with abbreviations and acronyms	
	6. Write brief, descriptive accounts of activities performed	
	7. Questioning and answering	
	8. Oral communication for descriptions	

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WORKSHOPS IN THE WORKPLACE
Methadone Maintenance Module
Filling Out an Incident Form

SUB TASKS

6. Describe circumstances that happened prior to the incident listing names of all people involved

7. Complete description of the incident by placing checkmarks where appropriate.

8. Sign on the appropriate line

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Adapted from STEP Workbooks

RELEVANT SKILLS

9. Observe in detail your surroundings

10. Vocabulary: Recognize the meaning of terms, including drug jargon

11. Vocabulary: Recognize the meaning of terms

12. Observation: Observe all the details of the incident

13. Write name legibly

HIGHER ORDER SKILLS

5. Recognize idea relationships, sequence of events, comparison and causation.

6. Compare and contrast differences in client during this incident.

7. Summarize the essential details for written communication

8. Thinking: Demonstrate ability to differentiate verbal and non-verbal communication

9. Compare and contrast, noting unusual behavior during incident

10. Discern patterns of client behavior and changes in client

Identifying Literacy - Workforce Education Training Needs

BPDI's approach to identifying training needs has been entitled **WESA - the Workplace Education Skills Analysis**. The two major components to this process are the **Task Analysis and the Literacy Audit.** The Task Analysis addresses the skills the employees are required to perform while the Literacy Audit determines the literacy level required for the individual to function and perform on the job. It assesses the basic skills required to perform the tasks as well as the literacy level of the representative employees.

Task Analysis has been called many different things in different training settings. It has been referred to as needs assessment, pre-training analysis, performance problem analysis and training needs assessment-TNA (Rossett, 1987). Most program planners and trainers distinguish between a job analysis and a task analysis. Jobs in essence are comprised of many different tasks and abilities or skills. Frequently one's job is augmented or modified from an original job description. This is particularly true as technology changes and concerns with employee productivity increase. A task list is often used to identify the basic skills and knowledge needed to perform on the job. This information is sometimes translated into a taxonomy to help determine optimum performance.

There are a variety of resource materials on performing task analyses. Task analysis has been one of the foremost techniques for creating vocational courses developed by the Vocational-Technical consortium of States (V-TECS). In this model the delineated tasks lead to performance objectives and form the basis for competency-based course materials. The ASTD (the American Society for Training and Development) too suggests a sequence of steps for performing a task analysis: identifying output, collecting data to record tasks, breaking tasks down into component steps, validating tasks, submitting recorded tasks to players for concurrence, designing a format for the analysis and completing and distributing the record for management review (Hull, 1987, p. 299).

The ***task analysis process*** entails the following:

- **selecting the jobs to be analyzed,**
- **developing a preliminary list of duties and tasks performed on the job to focus on basic job-specific workplace skills,**
- **reviewing, refining, and revising the preliminary list of skills using the expertise of the employer member of the Steering Committee,**
- **verifying and validating the skills necessary for the job,**
- **performing task-detailing on basic workplace skills for each task selected for inclusion in the training program.**

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The **Literacy Audit** involves representative employees who are assessed to determine reading, writing, communication and computational levels necessary to perform their jobs effectively; an audit of materials written and read at each job site are collected for further analysis to determine the skills needed by such employees to interpret and utilize these worksite materials successfully. So beyond reviewing the level of materials the Literacy Audit might also involve listening to employees read and/or observing them employ reasoning or problem-solving skills. Further, the Literacy Audit might involve the supervisor too for his or her perceptions of the specific skills needed to interpret materials and the literacy required to perform successfully on the job.

The individual(s) performing the task analysis and literacy audit is concerned with a variety of ***questions:***

- ***-what is the training need as perceived by the business partner inviting the educational sponsor in?***
- ***-what is the current literacy, performance and/or knowledge level of the targeted employees?***
- ***-what is the desired level of functioning?***
- ***-is there any discrepancy between how employees, supervisors &/or management view these?***
- ***-what are the initial attitudes or feelings toward the proposed training?***

Workplace literacy education is premised on the assumption that employees are lacking in some skills or knowledge. Still the educational trainer must remember that while this may be a major reason for work productivity problems there are others. Compounding problems include lack or absence of incentives, problematic environments or lack of motivations. Solutions too must vary. Solutions to a gap in skill or knowledge and even motivation clearly point to training interventions, while a "flawed environment" might lead to work redesign, the development of new or different tools or personnel reassignment; the lack of incentives might implicate the need for a change in policies or procedures (Rossett, p. 45).

There are a number of techniques that can be employed to facilitate the determination of the training content and sequence. The analyst must **examine** a variety of factors, including:

- **-the products of the employees' performance (samples of work, aggregate results like attendance rates, product returns, accident reports, sales figures, etc.);**
- **-the opinions of employees and employers as to what is happening and what is needed;**
- **-the ideal functioning attached to visible tasks;**
- **-the additional more cognitive less-visible elements or structures of optimal performance (reasoning skills).**

These taken into consideration form the basis for the assessment of need and the workplace training curricula. In order to perform a successful analysis the educator must --

employ a variety of methods:

- **-review tangible materials and documentation,**
- **-conduct individual interviews (with employees and managers),**
- **-conduct focus groups & meetings (with employees, labor & management representatives),**
- **-observe (incumbents on the job and the work environment itself),**
- **-meet with subject matter experts to break down procedures and skills into essential components and literacy requisites, and**
- **-survey through questionnaires.**

Through its workforce education programs BPDI has developed a number of project specific instruments and procedures. The tools are tailored for individual work sites but the Lead Trainer and/or Associate Trainer conducts a thorough WESA (Workplace Education Skills Analysis) at each potential training site.

Procedures

While there may be an ideal sequence for the conduct of training assessments the process is oftentimes determined by the availability of site personnel and constraints of work demands. In general BPDI does use a survey instrument administered individually or collectively to different strata of employee dependent on the worksite -management, union, supervisors, targeted trainee-employee. In addition to a review of the tangible work products and the company's track record (statistics and other data),the use of instruments (like questionnaires &/or checklists) helps focus discussions and aids in synthesizing the rich material gained from prospective trainees and their superiors.

Lead trainers- assessment analysts interview -
They speak to management to hear their view of the perceived tasks and/or problems. They speak to supervisors to hear their views. They speak to union and labor representatives and they speak with potential trainees.

The trainers review -
documentation and materials. Not only should the materials used on the job be explored, but any that are scheduled for adoption must be examined for level of vocabulary, computational skills, processing skills and decision-making skills. Part of the review process involves looking at data from the worksite regarding attendance, promotions, career paths, etc.

The trainers-analysts observe -
Watching some of the employees on the job gives a clearer view of the tasks current employees perform and their typical work environment. Observation gives not only a sense of current performance but potentially a picture of ideal performance too. It frequently leads to more objective insights about causality - for example, where are the problems apart from how they are perceived by the employees and the employers involved?

The process varies and is dependent on the individual worksite and the problems initially targeted.

The **WESA Survey** that BPDI has developed follows this discussion in the guidebook. It has two basic parts. Part 1 asks personnel to rate staff on their ability to perform a variety of activities (&/or individual prospective trainees to rate their own abilities). Part 2 asks the individual employee or supervisor to prioritize the perceived training needs, to ***"choose the most important area of training"*** and explain why.

The results of the survey are then processed and documented in a **Task Analysis Report**. This report may include:

- ***-the titles of those surveyed***
- ***-survey results***
- ***-perceived training needs***
- ***-suggested training topics***
- ***-the most highly prioritized topics***
- ***-other comments and requests, etc.***

Samples of some of these reports are included in Appendix A: Sample WESA Reports from Bronx Lebanon Hospital Outpatient Clinic and from Farberware, Corp.

Literacy Audits also involve direct employee and respective trainee input. It is important to note that while a sequence of topics and areas may be suggested, the process is continually revised and revisited based on employee input and feedback. BPDI has developed a twofold ***Workplace Fitness Plan*** that is completed by the employee.
The form (while modified to be site specific) asks employees to

1) review the list of Workplace Skills and note how they may be used on the job; and

2) select three skills that the employee would like to enhance and describe in 2 or 3 sentences why or how they might do this.

This Fitness Plan also forms the basis of objective setting for personal instruction, and group instruction; for those participating in the eventual training it becomes something of a pre-test or assessment of entry-level skills.
The Fitness Form follows the WESA Survey at the end of this chapter.

Identifying Trainees

Once the process of interviews, observations, surveys, reviews of written materials is completed a training report and plan is devised. In addition to respective training topics an amenable schedule has to be arranged.
[This is addressed further in Ch. 5 - Organizing Instruction.]

Here too the procedure varies depending on the organization to be served. In some companies the targeted trainees are identified from the outset; in others, the training needed is identified first and then once the time for the training has been settled upon the project liaison revisits the staff and identifies training recruits.

In the BPDI experience the Steering Committee has proven itself invaluable in the identification and recruitment of trainees.

As mentioned earlier the ideal situation includes released time, supervisor encouragement and other company-wide incentives that motivate the employees and "destigmatize" them from attending the proposed training.

If the trainees have not been identified initially it is frequently helpful to establish a profile of the trainee candidate.

This profile might include:
- position title,
- entry skills level,
- problems encountered or documented.

Supervisors can then review their records to select appropriate employees.

Whatever the procedure employed organizational support is a must and will be discussed further.

This chapter concludes with:
a summation in the Key Points section,
the WESA Survey Form, and the Workplace Fitness Form.

Key Points of Chapter Three

Assessing Training Needs

1) Review company data
2) Review materials currently used or intended for use on the job
3) Observe employees on the job
4) Interview management, supervisors, labor and employee-trainees
5) Use survey instruments to help focus and document needs
6) Generate a list of training topics
7) Prioritize training topics
8) Report back to partner organization through Steering Committee
9) Create a profile of the targeted trainee
10) Recruit appropriate level trainees making training objectives clear at outset

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WESA SURVEY

Please rate the ability of your staff to perform the following activities

1. Reading	–Poor	–Fair	–Good	–Excellent
2. Math	–Poor	–Fair	–Good	–Excellent
3. Writing	–Poor	–Fair	–Good	–Excellent
4. Problem Solving/ Reasoning	–Poor	-Fair	–Good	–Excellent
5. Motivational Skills	–Poor	–Fair	–Good	–Excellent
6. Speaking/Listening/ Communication	–Poor	–Fair	–Good	–Excellent
7. Team Building Skills	–Poor	–Fair	–Good	–Excellent

Part 2

If you were to choose the most important area of training, which one of the above would you select? Why?

Dr. J. Juechter
Dr. Doris Dingle

U.S. Department of Education

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#1

WORKSHOPS IN THE WORKPLACE

Business and Professional Development Institute

Instructions: Review the list of Workplace Skills. Which of these do you use on the job? Write a few notes to yourself with an example of when or how you use this skill.

1. **COMPUTATION** Mathematical Processes

2. **PROBLEM SOLVING** Figuring Out Difficult Situations

3. **SPEAKING** Effective, Accurate Presentation

4. **WRITING** Communicating on Paper

5. **LISTENING** Active Listening

6. **READING** Comprehension & Vocabulary

7. **INTERPERSONAL RELATIONS** Understanding Others

8. **TEAM BUILDING** Working Together Well

9. **CRITICAL THINKING** Analyzing Information

10. **SPEAKING ENGLISH** Communicating

#2

WORKSHOPS IN THE WORKPLACE

Business and Professional Development Institute

MY PERSONAL WORKPLACE FITNESS PLAN CONFIDENTIAL 1

Name _____ Date_____

Work Location _____

My job makes a unique contribution to my skills and my company (the clinic). To date my skills have enabled me to work well at the job. However, in order to grow and develop my effectiveness, I need to enhance MY workplace skills.

Think about the skills from the first Worksheet.

Which three would you like to improve? Write their names below. Write 2-3 sentences about why or how you could enhance your skills.

Skill # 1

_____

_____

_____

_____

Skill #2

_____

_____

_____

_____

Skill #3

_____

_____

_____

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_____

CHAPTER FOUR: PRINCIPLES OF ADULT EDUCATION APPLIED TO WORKFORCE EDUCATION

Andragogy

The growing field of specialization in education frequently referred to as Adult Education recognizes the uniqueness of adults as learners. The artistry involved in the teaching of adults has often been referred to as **andragogy** - to distinguish it from the techniques more frequently associated with the teaching of children - or pedagogy. Andragogical concepts and techniques are gaining widespread attention as concern for learning in the workplace has become a major focus for higher education, business and public organizations. As the emphasis on adult learning has increased so has this component of education gained in its professional recognition as a subspecialty. The techniques used in planning programs for and facilitating the learning of adults have therefore been widely researched and documented.

Facilitators of adult education focus on a few common and interdependent principles which when implemented have been identified as increasing the effectiveness of adult learning. These are subdivided into four major areas or categories for the purpose of this manual:

- **Establishing a Conducive Physical & Psychosocial Climate;**
- **Utilizing Action & Reflection, Experiential & Problem-Centered Techniques;**
- **Encouraging Dialogic, Collaborative and Participatory Learning; and**
- **Enhancing Critical Reflection, Independence and Self-Directedness of Learners.**

Reference to the major theoretical proponents of these concepts are included in this discussion, along with an overview of how they relate to the Workplace setting.

Establishing A Conducive Climate for Learning

In addressing the climate for learning the planner must attend not only to the physical needs but the psychosocial needs of the learner.

The Physical

Such aspects as seating, lighting, time of day, refreshments, visual and auditory stimulation, ventilation, etc. must all be taken into consideration in planning(Ennis et al., 1989). Adults as learners are extremely sensitive to their physical environment and their physical needs impact directly on their ability to receive, digest and process new skills and information (Galbraith, 1991). While the facilitator cannot always control the space allotted or the amenities available for training, he or she should strive to attend to these physical needs and take these into account in understanding the reactions and/or problems of employee-learners.

Conference tables - arranged in U or closed rectangular formation affords learners the ability to spread out their materials, attend to the facilitator (and any overheads, charts or displays) while simultaneously being able to make direct contact with each other.

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Movable tables - with separate chairs enable the facilitator to rearrange a room during an individual session to allow for a variety of learning activities (from lecture, to simulations or video recordings).

Refreshments -(such as coffee or other beverages) help put adults at ease and sends a clear message that this is a valued professional experience. Food and drink increase the development of a social and informal atmosphere (both of which decrease any threat associated with the training or classroom environment).

Allowing for breaks - enables adults to interact with each other and decreases the discomfort that may arise from having to leave during a lecture or interactive exercise.

Reinforce learning - with a variety of stimulants from visual reminders (overheads, flip-charts and handouts) to auditory stimulation (from lecture to informal dialogue) to kinesthetic reinforcement (physical motion); this helps to capitalize on the different learning styles embodied in any group of adults.

The Psychosocial

In attending to the psychosocial the facilitator must be cognizant of the characteristics of adult learners (both as individuals and collectively) - their individual styles, their attitudes, their motivations (Wlodkowski, 1990). There are many different elements to consider ranging from the cultural to the interpersonal and psychological.

In his formative work in adult education, Knowles (1980) demonstrated that adults learn best when they can see **the relevancy** and **application** of the learning that is to take place. Further adults need to be **treated with respect** and to have an atmosphere created in which there is **mutuality** (respect not only for the facilitator but for fellow learners as well) so feelings of fear, threat or subordination can be overcome (Brookfield, 1986).

James (1983) devised a set of basic principles of adult learning that have been validated by professional American adult educators. These serve as instructive reminders as one seeks to structure an optimal educational environment (p. 132).

Basic Principles of Adult Learning

-adults maintain a life-long ability to learn
-adults as a group are highly diverse in respect to preferences, needs, backgrounds and skills
-adults do experience gradual decline in physical and sensory capacities
-adults have experiences that are most valuable as resources in planning the learning activity
-adults move from dependency tc increasing independence with a growth in responsibility, experience & confidence
-adults have a tendency to be life or problem centered in learning
-adults enjoy a range and variety of motivations
-learning for adults is facilitated through active participation
-learning is further assisted by a supportive environment

Brookfield (1986) expands this list by also suggesting that the ideal instructional setting is one in which learners **participate voluntarily** -"by their own volition". Returning to the classroom or training session can be a threatening experience in and of itself, especially when the decision to attend the training experience is made externally (by a supervisor or personnel counselor); past learning and school experiences, compounded by feelings of loss of control can therefore impact negatively on the current learning situation. Further, the current work environment and feelings with respect to the need for being in the training are likely to impact on the emotional state and receptivity of the employee.

Brookfield also indicates that constructive criticism is a very important dimension in all learning; he stresses that the learner's sense of self-worth should never be compromised.

The granting of release time during the work day and/or the provision of monetary remuneration for after hours training are highly significant in preserving the learner's sense of worth and therefore crucial to the design of a successful workplace education program.

In addition, using strategies that demonstrate that the trainee's perception of the experience matters (Schlossberg, Lynch, & Chickering, 1989) help to further academic-program success.

Strategies that demonstrate concern include:

- **-mutual respect (Galbraith, 1990)**
- **-employee input**
- **-maintaining informality (Brue, 1985)**
- **-utilizing humor in instruction**
- **-friendliness on the part of the facilitator**
- **-rewarding participation, etc.**

Consistent with this theme of maintaining the the learner's sense of positive self-worth, educational-training gains should be treated seriously and they should be rewarded. Graduation-or completion ceremonies and awards are just some of the symbolic ways of acknowledging achievement.

Using Appropriate Techniques Action & Reflection, Experiential & Problem Centered Methods

There are a number of methodologies that adult educators continually cite as being at the heart of effective learning. In essence it is accepted that adults learn best when they are engaged in a process of learning that involves problem-framing and problem-solving, where learnings are related to real life situations, where solutions can be applied in daily work lives and where there is the opportunity to continuously reflect and act on one's own assumptions and new learnings.

John Dewey (1916), an early American education philosopher, first described an acknowledgment of this process of continuous ongoing investigation and exploration. Fundamental to this notion is that all further learning experience is grounded on previous experience. Future learnings occur with reflection and integration of past learnings. Paulo Freire (1970), a Brazilian educator, is commonly associated with the term **"praxis"** - a term he used to describe this process of action and reflection. In his work with helping South American workers develop basic literacy skills he emphasized the process of helping learners develop consciousness of the variety of forces which fostered their dependence and shaped their perception of their own work situations (as well as their ability to conceptualize their individual and collective futures).

More recently, works by Mezirow & Associates (1985) address the need for learners to become critically aware of their own ***"assumptions and premises, criteria and schemata"*** (p. 25). This action and reflection process is suggestive of a variety of educational techniques.

Instructional Strategies that employ experiential and motivational techniques include:

- **-critical questioning**
- **-critical incident exercises**
- **-role playing**
- **-debates**
- **-simulations**
- **-case studies**
- **-inquiry teams**
- **-contract learning**
- **-learning journals**
- **-games**
- **-modeling**
- **-coaching**
- **-mirroring, etc.**

These all foster the connection between action and reflection and serve to continuously engage and motivate the learner to improve his or her own practice and functioning.

The last, and perhaps most obvious experiential technique on the above list, is especially interesting in the workplace setting. Daloz (1986) refers to the learning technique of the "mirror". Employee-learners should be assisted in perceiving themselves in different ways and in tracking their own change and development as they evolve through the training experience. This might include contrasting early and subsequent expectations, examining initial and post samples of work, and exploring changes in feelings. These can all help in maximizing the benefits of the educational training experience.

Still, the skillful facilitator must remember that all of the above techniques involve a certain amount of risk-taking. They also have the potential for stimulating creativity on the part of the trainee.

Providing the right climate encourages risk-taking as well as creative thinking. It allows for honesty and enjoyment in what otherwise can be a painful confrontation with oneself and others.

Encouraging Dialogic, Collaborative and Participatory Learning

In reflecting on school-based training as contrasted to workplace education and training the dimension that emerges as most strikingly different is the involvement of the learner in the planning and design of activities. Learners can be extremely helpful in diagnosing their own learning needs. Further, their involvement and motivation increases if they are part of establishing a cooperative goal structure (Wlodkowski, 1985).

To encourage this involvement and maximize learners' sharing dialogic techniques should be employed. Critical discourse however is not an easily implemented concept, nor does it suggest participation for participation's sake. Brookfield (1987) writes that it is important to attend to the emotional elements that discussion arouses. There must be a foundation of **caring, listening** and **respect.**

Facilitators need to remember that active participation and learning might be occurring despite a learner's silence. The facilitator must maintain a certain willingness to be **flexible** as every session is likely to depart slightly from anticipated objectives. Much "meaningful learning" happens in unanticipated ways and the trainer-educator must also remain open to the ***"teachable" moment***.

Discussion plays a formative role in helping learners interpret their own and others' perspectives, assumptions and actions. Through dialogue learners gain exposure to a diversity of perspectives; they can externalize their values, beliefs or actions for more objective scrutinization; they can begin to embrace ambiguities and the complexities embodied in a variety of issues. Encouraging dialogue helps trainees learn to reality test.

Frequently however controversy arises as to how a dialogue is to be utilized or evaluated, especially since discussions often lead to participants leaving with feelings of disturbance or pain. The facilitator's role is to help learners seek closure, ***to challenge "habitual givens"***, and to realize the relationship of others' perspectives to their own lives (Galbraith, 1991).

Dialogue is essential in developing and enhancing employee communications. The communicative process involves the employee learner in a collaborative process of assessing or redefining learning needs and thereby generating learning objectives.

Collaborating in selecting methods and evaluative procedures also assists in obtaining & maintaining learner involvement. With collaborative techniques the role of the respective facilitator, planner and learner cease to be so clearly defined. The employee-learner can begin to assume some responsibility for framing central questions, selecting provocative and stimulating materials, helping to prioritize the sequence of instruction, correcting the course when necessary, and organizing many of the aspects of group process.

Collaboration also acknowledges the reservoir of experience that the adult brings to the learning experience and includes it as a resource. This aspect of adult education has frequently been cited as the "defining principle" (Brookfield, p. 14) of adult education. In applying this hallmark principle to the workplace the facilitator comes to realize that there may be a fundamental discrepancy in seeking to create a collaborative environment, simply by virtue of the learner's employee status; this is especially true in very hierarchical work organizations. Hence the "distinct tradition" of "adults meeting as equals in small groups" is at times but an ideal, despite the best of intentions. The facilitator is therefore reminded that helping employees learn to network is thus critically important.

Strategies that encourage dialogic participation include:

- **facilitator flexibility**
- **an atmosphere of voluntary participation**
- **honesty**
- **the existence of no negative repercussions for expressing divergent views.**

Enhancing Critical Reflection, Independence & Self-Directedness

Studies and research into effective learning within organizations all point to the requirement for learners or workers to become conscious of the assumptions and norms underlying accepted practice and the requirement for learners to begin to think of imaginative or creative alternatives (Peters and Waterman, 1982; Argyris, 1982). This is only possible when the individual enjoys some level of individual autonomy & self-confidence with respect to his or her own life-world and learning capability.

Critical reflectivity is often associated with transformations in learner perspective (Mezirow and Associates, 1990). This process further leads to a reconstruction of thought and activity - a "reflection-in-action" that shapes current and future activity (Schon, 1987). The ability to challenge one's own perspectives leads to independence and optimally to empowerment (Mezirow and Associates, 1990) - the ability to help shape one's environment. Critical reflection ultimately leads to a recognition of one's own learning processes, needs and perhaps self-imposed limits.

Encouraging independence helps develop self-directed learners who are aware of the contextuality and cultural constructs that influence their thoughts and actions. Fostering independence helps learners explore and recognize their own capacity for self-directedness. (Galbraith, 1991, p. 24-25).

Tough (1979), another renowned adult educator, in particular has urged other adult educators to remember that all adult education activities share this objective of developing the self-directedness of the learner.

Increasing learners' self-directedness is considered to involve increasing the learners' ability to:

-realize learning objectives
-diagnose learning needs
-identify learning resources and strategies, and
-find means for evaluating personal learning.

As educators and trainers enter the workplace (as external agents invited to address specific organizational learning needs), this theme of encouraging and enhancing learner self-directedness becomes a worthy organizing objective; increasing learners' self-directnedness and autonomy can serve as a unifying philosophy to guide the education efforts of professional workplace literacy educators.

Key Points of Chapter Four:

Principles of Adult Education That Facilitate Workplace Education

1) Build a Positive Climate
   -establish a conducive physical environment (provide comfortable seating, conference desks spacious rooms with sound acoustics, temperature & lighting control; provide frequent breaks & refreshments),
   -attend to the psychosocial needs of learners (encourage mutual respect, capitalize on learner's experience, relate learning , maintain humor, informality and flexibility)
2) Utilize Experiential Techniques
   -include problem-posing and problem-solving exercises (use simulation and interactive exercises including -case studies, journals, team-learning, critical incidents, etc.)
   -encourage action and reflection
3) Employ Participatory and Collaborative Methodologies
   -encourage dialogic participation
   -include employees in needs assessment, selecting instructional techniques and resources, establishing goals, and identifying evaluative criteria and methods
4) Aim for Learner Critical Reflection, Independence & Self-Directedness
   -encourage self-responsibilty for life-long learning
   -develop skills for seeking and pursuing other educational and autonomous learning opportunities.

Establishing & Delivering the Training Cycle

Once the topics for training have been established and prioritized they must be sequenced into a curriculum. The duration and length of training frequently depends not only on the production or work cycle of the partner but the organizational constraints of the educational sponsor.

The BPDI ***Workshops in the Workplace*** training modules have for the most part been arranged around a 30-36 hour course length. Instruction or sessions are delivered in two hour blocks of time, once per week. Two hours is a reasonable period for employers to release employees and it conforms well to learner attention and motivational considerations.

The Curriculum and Schedule -

The BPDI DOE ***Workshops in the Workplace - WESA and Literacy Audits*** lead to the generation of training topics and instructional plans that are arranged in site specific modules. The training schedules vary from 15-18 sessions each. Samples of just four such schedules are included in Appendix B and are described below. The modules that are included represent the first cycle of training completed at each respective site.

-***The Bronx Lebanon Clinic Workshop*** module was 18 sessions long. It focused on preparing Methadone Clinic counselors to improve their written and communications skills - to keep better psychosocial records, to communicate more effectively and to work more cooperatively.

-***The Cox & Company Workshop*** module was 15 sessions in duration and focused on communications and critical thinking; it was what BPDI call a WESL module - Workplace English As A Second Language.

-***The Farberware Workshop*** module, 18 sessions in duration, was focused on problem solving, critical thinking & team development.

-***The Kruysman Workshop***, a 15 session module, was also focused on Workplace English - it was thematically organized around "Try English First."

All of the training programs included reading, writing and computational skills, coupled with the problem solving, critical thinking and team development exercises. In-take assessment, periodic and outcome evaluation (see Chapter 6) was an integral part of the program.

In organizing the schedules BPDI trainers include tentative training session outlines - to correspond to each of the scheduled (15-18) sessions . The ***Session Outline*** minimally includes the topics shown below.

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Session Outline Headings

Workshop Site:
Session #
Topic:
Performance &/or Instructional Objective:
Materials Needed:
Motivation:
Development:
Review Activity:
Application:
Evaluation:

Three such sample session outlines are included in Appendix C. They are for Farberware [Sessions-#4 & 7 -Problem Solving in the Workplace & Clarifying Company Information With the Use of the Calculator, respectively] and for Kruysman [Session 13 -OSHA & Safety Standards & Communications].

Motivational Considerations

Some of the issues that effect the delivery of instruction include the motivation and attitude of the employee as (s)he approaches and experiences the training. Wlodkowski (1990) has postulated a "Time Continuum Model of Motivation" for the educator to consider. In this model the design and organization of learning activities (whether they be of individual session length or for the duration of the training cycle) are conceived on a time continuum.

Each aspect or phase of training impacts on subsequent learnings. The continuum is broken into three parts: ***beginning, during*** and ***ending.*** There are two major factors for each phase that correspond to some useful queries (p. 106) for the workforce educator and or instructional designer. These factors and the questions for each follow.

THE TIME CONTINUUM

Beginning - Attitudes & Needs Ask:

How does one create a positive learner attitude to this training sequence?

How does one best meet the needs of the trainees through this training?

During - Stimulation & Affect Ask:

How can the training activity continuously stimulate the learners?

How can the experience and climate be affectively positive?

Ending -Competence & Reinforcement Ask:

How does the training contribute to an affirmation of learner competence?

How are reinforcers provided for the learners in the experience and sequence?

Being Responsive - Customizing the Curriculum

Another consideration in the delivery of instruction is the actual provision of in class activity (as well as the provision of out of class work). This discussion will focus on those methods that are consistent with the principles of adult education and the functional context approach - those techniques that are fundamentally experiential. Customized instructional activities in problem solving, critical thinking, decision-making and team planning include the building and reinforcement of the basic skills in reading, writing, communicating and calculating. Classroom-training activities are described further below.

A generic overview of methods precedes a description of some of the BPDI customized training activities. The latter are provided simply to show how one can take the concerns of employer and employee, the proven techniques, and build them into relevant and exciting learning experiences for participants. Before presenting these methods though the reader is reminded that knowing one's audience

is critical to the design of successful workforce education programs. It cannot be stressed highly enough that the educational trainer must be responsive to the particular trainees at an individual worksite - one is cautioned never to assume similitude to other settings simply by virtue of the employees' work status or because of similarity in industry. Organizing the training group homogeneously or heterogeneously becomes a site specific decision dependent on the individual culture of the organization.

The literature abounds with descriptions of how complex the lives of most working adults are (the multiple roles they juggle and their many responsibilities); one frequently reads that because of these alternative factors that take precedence in adult life, out of class time tends to be quite limited for the average employee - hence any requirement for "homework" should be limited to tasks that are kept extremely relevant, pleasurable, require minimal time and are easily accomplished. As indicated however, the trainer must also meet the learners' expectations (which often-times are culturally conditioned).

Interestingly, it is the BPDI experience that (in being culturally sensitive to one particular site's employee population), at times, there was a request for both a highly traditional methodology and substantial homework. Though seemingly antithetical to the prevailing philosophy on adult education techniques, the underlying message is that the trainer must discover and meet the learner's expectations before moving forward to more self-directed and less teacher-trainer led methodologies.

Instructional Techniques

Lecture and Demonstration

While the more traditional methods of lecture and demonstration can certainly be used successfully in adult training they are limited by certain factors. Both lectures and demonstrations are very much facilitator directed with a controlled pace. In general they tend to put pressure on "short term memory" which for the employee is "often already being taxed" (Lewis, 1987, p. 255). Further there is little room for feedback and those lacking in notetaking, communications or English language skills are even at a greater loss. Still it is important to remember that lectures can be particularly useful if one is trying to provide listeners with cognitive clues to reasoning or a framework for perceiving - **demonstrations** can give the audience a view of what truly skilled or optimal performance looks like. The instructional ideal however is a combination of the above with the more "hands-on" - practice - reinforcement - mastery type of experiences included.

A description of some of the commonly used experiential techniques and some samples of those used in the BPDI ***Workshops In The Workplace*** follow. These methods are not mutually exclusive or discrete in nature. The more creative the combination and the more relevant to real work situations, the greater the likelihood that transferability and longterm skill building will take place. Associated with all of the techniques described is the opportunity for the employee to practice and attain skill development because of the learning environment created (one that is less threatening because of the eradication of both fears associated with making on the job mistakes & of negative repercussions for making mistakes).

Experiential Techniques

Role-playing

This involves the improvisation of behavior to better understand and practice behaviors associated with conceived roles. Facilitators might structure scenarios around real work situations, reenact conflicts, or use hypothetical scenarios to allow for idealized behaviors. In WESL the role play is frequently used to practice new vocabulary; in career training and work readiness programs roleplaying is used to desensitize individuals to potentially stressful situations (the employment interview, answering multiple phones, etc.). ***[See Appendix H on the BPDI Reporting A Problem exercise.]***

Simulations
These are based on real work situations and replicate the work environment. Offices may be set up and individuals given "in-basket" exercises (responding to a series of memos) - a work team might be set up to assemble a product - pilots might enter a flight simulator to test reaction time, etc. The essence here is to be able to self-reflect on one's own behavior with some objective input from others. Debriefing is key. Research shows that this is a most effective technique in impacting on attitude & motivation.
[See Appendix F on the MEMO Writing Module.]

Case Studies
These range from the actual to the hypothetical. These help learners become more process oriented and involve employees in ownership of decision-making. Case studies must be adequately detailed and descriptive to evoke the interest and imagination of the learner - the desire to solve a problem by suggesting and owning the postulated course of action. Case studies also allow for team building. Employees should be encouraged to: document what they feel are the key points, share their interpretations of the major problems or key issues, pose what additional resources they feel are needed, develop a list of alternatives and their rationales, and finally make and defend their decision for the course of action.
[See Appendix D for a BPDI Case Study on Decision Making at Farberware.]

Journal Writing
Through the exploration of experience this helps learners better organize their thinking. It is non-threatening and allows for delayed processing. Journals help students track their own development and if shared with a facilitator can act as an informal tool for assessment. These can also serve to broaden the pool of work themes to organize future learning activities around. Trainees should be encouraged to document work events, their reactions to them and what they think they learned from them.

Brainstorming & Visualization
Here employees are encouraged to generate lists that are responded to in nonjudgemental ways. Brainstorming generally entails some form of calling out at random (although at times a roundrobin approach has been used). Employees might be called upon to list problems on site or to suggest solutions to problems. These too can help in the generation of the training curricula. Visualization is generally associated with the more creative generation of alternatives - those not constrained by the current rules or operating procedures of the particular worksite.
[See Appendix E for some further materials on Brainstorming and the Farberware experience.]

Games
These are often used to help do team building and to give employees insights into their own and another's views. Survival games and training exercises have recently gained in popularity as a means for helping employees develop their own internal resources, rely on each other, and reflect on their own social sensitivities.

Critical Incidents
These ask employees to identify meaningful incidents and/or events and describe them. Trainees are asked to write a brief narrative about the event - to identify who was involved (by title or role), where and when it occurred, and why it was troubling or significant. In addition the learner might include what (s)he did and what the other individual(s) did. The premise is that this represents a more accurate and objective description of what is happening for the participant. The themes generated when processed and debriefed also help in focusing the trainee's understanding of his or her own, and others', characteristic stances. Reporting would include an analysis of one's biases and the implications of them. Learners then begin to assess the validity of their inferences and to postulate alternative interpretations to the incident or their reactions. Through this technique learners begin to challenge their own assumptions and actions.

Contract Learning
This is very helpful in individualizing instruction for employees and in helping to enhance overall learner and employee self-directedness. Participants are encouraged to develop their own learning plans replete with: learning objectives, learning resources, a schedule of dates for the learning activity's completion, evidence of accomplishment, and some form of criteria for assessing whether the effort has been successful.

Other techniques sometimes used but not discussed further here are the:
Nominal Group Technique for prioritizing or decision-making (for encouraging individual participation and used in resolving problems expeditiously - round robin generation of problems and solutions are followed by a vote);
Inquiry Teams for enhancing collaborative activity to pursue solutions to specific problems or issues (for in depth exploration of problems and the positing of solutions to a larger group);
Mentoring for enhancing individual learning or cultivating individuals to fill anticipated roles (for guiding and developing a protege to assume a new role in the organization).

Finally it is important to note that in most all of the above techniques discussion is a vital part of the process, whether it be done one-on-one, in small or large groups. So the importance of developing and enhancing communications skills is a theme that runs throughout the design and conduct of all education training & development.

INTEGRATING LITERACY SKILLS CONTENT AREAS

(Sample Exercises:)

READING & WRITING:

In learning to improve their written expression and develop workplace skills of writing letters, memos and other written communications employees are encouraged to write a hypothetical letter or memo. [Employees must have the ability to communicate with their supervisors, or personnel in writing, regarding vacation requests, benefits & leave.] In one such ***Workshops in the Workplace*** exercise a variety of skills are included. Participants are asked to read the Company's Contract & Employees' Benefits Manual to ascertain the vacation policy or leave policy. (In most work sites there is protocol involved in taking time off and there are fixed times employees are allowed leave dependent on tenure, seniority and plant staffing.)

Employee-participants write hypothetical letters requesting specific vacation time. The class is subdivided into personnel teams to read the letters and determine whether they would grant leave based on the strength of the letter and interpretation of the Contract. Most initial letters end up being stamped rejected by the participant teams. This then motivates more careful attention to both reading the contract and composing letters of request.

The subsequent writing samples tend to be much improved with many more employees granting and granted leave.
[Additional Memo Writing resource materials are included in the Appendix F, Bronx Lebanon: Sample Memo, Memo Model, Memo Form, Writing A Good Memo & Memo Magic.]

CALCULATING:
In learning to find percents, calculate over time, and use the calculator one exercise adapted for use at different sites has participants figuring out how much they would save after 30 years if they had a fixed salary and contributed a certain percentage rate per annum to their 401(k) savings plan. Participants concurrently have to use a dictionary and interpret the Employee Benefits Manual.

[Other Calculator lessons are included in Appendix G: Calculator Lesson 1 Bronx Lebanon, Calculator Problems, Check Up, Farberware Skid Assignment & How Much Does This Training Class Cost.]

ESL (English as a Second Language):
Participants may develop English conversation vocabulary and practice through problem posing. Employees frequently indicate that they have trouble talking to their supervisors in English. Further they are not usually involved in problem solving. Trainees can first practice reporting hypothetical problems to supervisors. They can then generate real problems they've experienced to practice dialogue around. Employees can bring their new vocabulary back to the job for practice. In class feedback then involves dialogue and vocabulary building around managers' and supervisors' reactions to the articulation of the problems & proposed solutions.
[See Appendix H for some preliminary materials of the Problem Module.]

The above discussion and supplementary materials contained in the appendices represent just a few small examples of how integrated and inter-dependent the basic skills are to successful employee functioning. Most exercises require elements of reading, writing & communications. Simple problems can have reinforcing elements in the basic skills areas and instruction can be developed thematically around employee concerns.

Key Points of Chapter Five:

ORGANIZE & CUSTOMIZE THE CURRICUMUM AROUND THE TRAINEES

1) Create a training schedule based on prioritized topics generated through the Task Analysis & Literacy Audits
2) Have session outlines that include performance objectives, motivational techniques, application & review
3) Customize the curriculum to be relevant to real work problems at trainees' sites
4) Integrate reading, writing and computation into problem solving and decision making exercises
5) Emphasize communication skills in the design of instructional activities.

ASSESSING LEARNING & EVALUATING TRAINING

Evaluation in workforce education is a most complex area. It involves not only assessing participant's learning but the results of this learning as well. Traditionally the relative satisfaction of employees with respect to training was the evaluation criteria most organizations used to assess training; however, more recently, most organizations have recognized the need to go beyond learner satisfaction. The Kirkpatrick (1976) framework has often been used to help conceptualize the issues involved in evaluating employee training. This framework classifies areas of responses to evaluation concerns; the levels are:

The Kirkpatrick Framework
the reaction of the learners,
the learning derived from the training,
the behavioral change resulting from the program, and
the results the training has for the overall organization.

Translating this Kirkpatrick hierarchy into an evaluation model causes the education evaluator to move beyond an exploration of the participant's learning through the traditional pre, interim and post assessments of knowledge, skill and motivation. According to Beatty, Benefield and Linhart (1991, p. 171), internal program evaluation of the participant is then concerned with differing issues dependent on the focus in point of time.

[Training Participant Evaluation Issues]

initiation: life experiences, learning styles, course expectations and course planning;
transactional issues: course content, methods, interpersonal processes, & learning climate;
outgrowth issues: life experiences, learning styles, course expectations, future planning.

All of the above correlate to the work context; in the outgrowth category especially the response of others involved in the partnership arrangement is vital (i.e, supervisor satisfaction with the training, management and labor's perception of the training and the overall impact on the work organization).

Goal Setting -

For the individual learner, the organization, as well as for the program evaluator, goal setting becomes an important dimension of the evaluation procedure. The trainer's foremost concern on participant learning and the strength of the program is typically augmented by the organizational concerns for self-improvement. The educator is then also interested in having positive impacts on the partner organization. Some of these additional goals are listed below.

Additional Program impacts:
the increase of productivity,
the improvement of quality,
the reduction of costs,
the improvement of morale,
the reduction of turnover, and
the reduction in accident rates
(Courtenay & Holt, 1987).

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It is inperative in any successful training program that there also be some "evaluation standards." Without these individuals, instructors and program evaluators have no guiding philosophy with which to undertake assessment or compare and contrast learner and program accomplishment. The U.S. Dept. of Education's Planning and Evaluation Service sponsors The National Evaluation of Effectiveness of Workplace Literacy Programs - NEEWLP; it has commissioned and hence derived the NWLIS - National Workplace Literacy Information System (Mathematica, Inc., 1995). This system serves to collect, analyze and report information on literacy project implementation and outcomes.

NEEWLP is concerned with

> *"a broad range of program effects that include individuals' job performance, job promotion, job retention and work-relevant behaviors and dispositions. Second, the evaluation seeks to identify practices and structures associated with effectiveness, and to develop a model to validate these effective features and designs across other settings."*
> (Mathematica, I-2).

NWLIS has developed its own Learner Assessment Forms and Outcome Forms. Despite the requisite to thus collect and maintain substantial information for the Federal database and evaluation program [see a further discussion of this in Ch. 7], BPDI has established its own internal set of standards, operating & evaluation procedures.

BPDI has focused much of its Staff Development, Steering Committee, and Evaluator efforts on enhancing its project through programwide assessment and evaluation of the ***Workshops in the Workplace.*** The discussion that follows begins with individual learner assessment, then moves to a review of the role of the evaluator and finally focuses on overall program evaluation.

Individual Assessment Procedures

Each candidate for training in the ***Workshops in the Workplace*** program has an individual folder or "portfolio" that is comprised of a variety of testing materials and work products. A specific form (tailored to each site) and related to the specific training is used to keep track of each person's progress. An overview of this BPDI programwide procedure for individual participant assessment in one training area - WESL (Workplace English as a Second Language) is provided below; the recommended "***Evaluation and Assessment***" form follows the narrative. Trainers-Instructors also maintain ***Progress Reports*** on learners. This is filled out monthly. This form follows the ***Evaluation & Assessment*** on the following pages.

WESL - Participant Assessment

1.Writing Skills
A minimum of six samples of writing including one from the first and last day of training. Writing skills are evaluated and graded by the trainer. (Students complete the Personal Workplace Fitness Plan upon entry-see end of Ch. 3).

2.Speaking Skills
Each trainee is evaluated at three points in training: First day, midpoint and end (within the last two weeks)

3.Development of a Workplace Vocabulary
Trainees develop a personal dictionary-skills include the ability to pronounce and define key words. Oral and/or written questions are used for assessment.

4.Dictionary Use
Notation on the trainees ability to look up, read and understand the use of the dictionary are entered.

5.One Workplace CLOZE Test
At least one workplace reading will be developed for use as a CLOZE test -it is administered on Day 1 or 2 and utilized again during the post-testing phase.

6.Self Evaluation
This is to be conducted with the Evaluator. The Workplace Fitness Form is also used as a self-evaluation.

WORKSHOPS IN THE WORKPLACE
Business and Professional Development Institute

EVALUATION AND ASSESSMENT

WESL FORM **J. Juechter**

NAME_____**WORKPLACE LOCATION**_____

Writing skills
Sample 1 2 3 4 5 6

Grade
(1 - 3)

2. **Speaking skills (Vocabulary, tenses, sentence structure)**
   Evaluation 1 Date_____

   Evaluation 2 Date_____

   Evaluation 3 Date_____

3. **Development of a Workplace Vocabulary**
   (Written) Number of Words_____ **Definitions**_____
   (Oral) Date_____

4. **Dictionary Use**
   Evaluation with Examples

5. **One Workplace CLOZE Test**
   Reading Topic _____
   1. **Date**_____ **Score** _____ **of** _____
   2. **Date**_____ **Score** _____ **of** _____

6. **Self Evaluation**
   Interview with Evaluator YES ____ **NO** _____ **Date** _____
   Self Evaluation Complete _____ **Incomplete** _____

7. **Other**

WORKSHOPS IN THE WORKPLACE

U.S. Department of Education & Bronx Community College, CUNY

PROGRESS REPORT

NAME of STUDENT_____

WORK LOCATION Bronx Lebanon Hosp. ____ Farberware ____

INSTRUCTOR Khadija DeLaroche

Directions: Please fill in a report for each student on a quarterly basis. Turn in the Progress Report to Mr. Grant at the end of your teaching assignment.

DATE PROGRESS /EVALUATION

Month 1 Attendance Regular__ Sporadic__ Absent__Dropped___

Punctuality On time __ Sporadic__ Always late___

Class Participation High__ Moderate __ Low __

Language Proficiency Evaluation Evidence

Speaks

Writes

ESL

Math/Computation Skills Evidence

Writing Skills Evaluation Evidence

OTHER COMMENTS

DATE PROGRESS /EVALUATION

Month 2 Attendance Regular__ Sporadic__ Absent__Dropped___

Punctuality On time __ Sporadic__ Always late___

Class Participation High__ Moderate __ Low __

Language Proficiency Evaluation Evidence

Speaks

Writes

ESL

Math/Computation Skills Evidence

Writing Skills Evaluation Evidence

OTHER COMMENTS

_____DATE PROGRESS /EVALUATION

Month 3 Attendance Regular__ Sporadic__ Absent__Dropped___

Punctuality On time __ Sporadic__ Always late___

Class Participation High__ Moderate __ Low __

Language Proficiency Evaluation Evidence

Speaks

Writes

ESL

Math/Computation Skills Evidence

Writing Skills Evaluation Evidence

OTHER COMMENTS

_____DATE PROGRESS /EVALUATION

Month 4 Attendance Regular__ Sporadic__ Absent__Dropped___

Punctuality On time __ Sporadic__ Always late___

Class Participation High__ Moderate __ Low __

Language Proficiency Evaluation Evidence

Speaks

Writes

ESL

Math/Computation Skills Evidence

Writing Skills Evaluation Evidence

OTHER COMMENTS

INSTRUCTOR SIGNATURE _____DATE_____

In conjunction with maintaining and completing these tailor made forms the trainers-instructors must select and/or develop from a wide variety of assessment tools. Worksite specific pre-tests, training, interim and progress reports, and trainir g post tests are employed. It is important to remember that the choice of tools or instruments is dependent upon a variety of factors. These include but are not limited to:
-the instructional climate (and the cultural needs or sensitivities of the trainee population),
-the objectives or goals of the trainees,
-the objectives of the business partner, and
-the nature of the training.

Basic literacy programs, especially those administered through the wide array of Federal funds, including those under the Adult Education Act commonly use the TABE exam (Test of Adult Basic Education) and or other standardized achievement tests like the Woodcock-Johnson Achievement (Beder, 1991). These exams correlate educational progress with reading and math grade levels. But experienced trainers know to look beyond and consider achievements within the context of the specific training program. Some additional
program specific evaluation tools include:
-**trainer prepared Cloze Tests** (using workplace specific materials; these can be used as both pre-and-post tests);
-**content exams** (using the actual instructional materials - this checks for comprehension and can act as a reinforcer as well);
-**work products** like writing samples (these can be developed using the actual instructional assignments during the course of training - earlier and later samples {including ***Workplace*** Fitness Forms, free writing, practice and actual memos, vocabulary practice exercises, notes taken in class, letters, and so on} can be compared);
-**trainer prepared skill tests** (these can include calculator use [pre & post], oral public and conversational speaking [as observed by the instructor pre & post], decision making simulations [pre & post], and so on).

It is also important that the program in some way standardize levels so that progress can be uniformly assessed and monitored.
Appendix I **includes: the BPDI - Workshops in the Workplace WESL (Workplace English As A Second Language)**
-Program Standard of Levels; followed by a
- Content Multiple Choice Pre Test (part of a Decision Making Module);
-Pre & Post Content Test Used at Farberware; and then three different
-Trainer Prepared Cloze Tests developed for Farberware.

The Role of the Evaluator

The BPDI ***Workshops In the Workplace*** Program uses an external, "objective" evaluator. Though included in the grant this individual is part of the Institute for Literacy Studies at Lehman College, CUNY. Having this additional resource contributes to the objectivity of data & feedback.

At the startup of this DOE grant the Evaluator did some baseline interviews with the trainers, the instructors, the project staff and the participants at each site (a bilingual assistant was used to conduct some of the interviews at WESL sites). A minimum of 3-4 participants were interviewed at each site. Interviews were taped and transcribed for qualitative analysis.

The Evaluator also conducts observations and has frequent informal contact with the business partners. The Evaluator participates in both Staff Development-Administrative and the Steering Committee Meetings. This constant on-going participation enhances the quality of the program by ensuring a broader perspective and the continued dialogue regarding objectives, procedures, content and reactions.

Along with the Director of Research and Evaluation and the Institute of Literacy Studies Team, the Evaluator has also developed some Formative evaluation procedures

for interviewing the business partners, instructors, and employees (during Fall 1995). These qualitative questions are contained on the next page and are headed Trainer, Instructor & Employee Interview Questions (respectively). This protocol was modified for each particular site according to training content area. A follow-up Summative assessment will be made at the end of the project period and the responses from the initial and final evaluations compared.

It is the BPDI experience that ensuring objectivity of feedback and continual "reflection on practice" are vital to workforce education program success. Sharing the results of this dialogue has been the purpose of the Guidebook. The lessons learned to date are broadly summarized in the Conclusion of the Guidebook under Recommendations & Applications for Workplace Literacy Practice (Chapter 7).

Program Evaluation

In addition to input from the Evaluator, the program **obtains constant other feedback.** The Steering Committee meetings, the open door policy with trainees, and the project meetings all serve to ensure the quality of the program through the constant correction and upgrading of the contract planning.

Business partners maintain an intimate working relationship with the Project Director and lines of communication are constantly open. Program feedback (from participants, trainers, supervisors, and business partners) is therefore continuous.

In addition to progress data, **"outcome data"** on every participant and course is also collected, maintained and processed. Through the NWLIS system the program maintains and analyzes: Attendance Forms, Course Forms, Learner Enrollment Forms, Learner Assessment Forms, and Outcome Forms (Mathematica, 1995 pp. III3-69).

NWLIS Forms:

-**The Course Form** addresses the skills taught, time and place of instruction, the level of skills taught, the methodology (e.g., team, individual, Computer Assisted) and curriculum (Basic Skills, ESL, GED, Problem Solving, etc.), as well as pre-test information for placement (types of instruments used);

-**The Learner Enrollment Form** addresses basic demographic data (race, age, sex, country of origin, years of schooling, employment status, earnings, skills needed on the job, benefits, union membership, language proficiency and education, history on the job) and employment background of the employee;

-**The Learner Assessment Form** addresses the learner's objectives and perceived abilities since beginning the course;

-**The Outcome Form** addresses the instructor's sense of changes in the learner's ability as indicated by pre and post testing.

Attendance data is also maintained.

Appendix J contains samples of the Learner Assessment Form and Outcomes Form. In addition to the above, at the close of every course the BPDI ***Workshops in the Workplace*** trainers and instructors conduct group & individual assessments with the learners.

Employee Interview Questions (exploratory questions may follow individual responses)

-Describe your past experiences as students
-What are your hopes/expectations for this program?
-Why are you here? How did you get involved in the program?
-What's been the best thing that's happened so far?
-What's been the hardest/worst thing that's happened so far?
-How has this been different than other educational experiences?
-Have you noticed any changes at work, home, . . .?
-A few students have said that it is good that the program only deals with reading and writing in the workplace, not other reading and writing. How do you feel about that?
-(How) has this program helped you think about your work (include specific probes, i.e., changing forms at Bronx Lebanon, rivets at Kruysman, calculators at Farberware, etc.)?
-How do you view the role of the interpreter/translator?
-Do you have any other comments?

Trainer/Instructor Interview Questions

Project Roles & Expectations

-Would you describe your background in adult and workplace literacy?
-Would you describe the project and your role in it, as you see it?
-What are your expectations, goals, objectives for each of these project sites? With two of you in each class, could you describe your respective role in the class?
-Would you describe some ways the training at each site has been shaped to suit the site?
-What role did supervisors, managers and the type of work employees do, play in the design of training?
-Are your expectations, goals, objectives being met? How do you know?
-What's been most difficult or challenging/easy or smooth about the project and its implementation?
-How do you see your role, when you learn certain information about how the company is run or functioning?

Instructional Technique

-What are 2 or 3 guiding principles that are important to you in teaching adults?
-What are the most helpful techniques for working with workplace literacy learners?
-Would you describe an example of activities that illustrate your principles (use the class observed if possible)?
-Would you tell me about how you see writing fitting into your curriculum -how it is now &what you would like it to be?
-How was the class schedule determined?
-What are you finding to be the most effective ways of using the 2 hour blocks of time or making it work well?
-How do you plan your curriculum? How much flexibility is there in your course outline?
-Are you training for specific jobs?
-How did you choose instructional materials, tests, etc.?
-How do you address the needs of students who are more beginning readers and writers or English speakers?
-Who chose the fluency first program?
-How did you choose the John test for ESOL students?
-How do you see the role of the interpreter?

Broad Literacy Goals & Expectations

-What are your expectations for the effect of this training on employees' literacy in general, i.e., at home, in their communities. . . ?

Expectation of Evaluation Process

-What do you expect of this evaluation process?
-Are there any issues that weren't addressed in the interview?

Business Partner Interviews (1994 & 95) WESL

-What were your expectations, goals, objectives for your employees who participated in this project?
-Do you feel the training was shaped to suit the site? If so how? If not, why not?
-What role did supervisors, managers, and the type of work employees do play designing the training?
-Were your expectations, goals, objectives met? How did you know?
-Have you noticed any change in participants' use of English at work?
-Were employees'/union's expectations, goals, objectives met? How did you know?
-What's been most difficult or challenging/easy or smooth about the project and implementing it?
-Any other comments?

Fall 1995

-What are your expectations, goals, objectives for your employees who are participating in the project this fall?
-Do you feel that the training has been shaped to suit the site? If so, how? If not, why not?
-What role did supervisors, managers, and the type of work employees do play in the design of the training?
-Are there any other things you'd like to share about the program?

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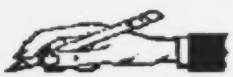
Through interviews they seek to discover:

- participant reactions to the course,
- perceptions of changes in ability based on course participation,
- impact on the organization through participation, and
- recommendations for modification to the program.

Instructors also use more objective measures to assess student progress (post-testing through program prepared and commercially prepared tests as well as supervisor report).

Trainers-instructors and program staff also meet with the business partners to discuss the above. All of this assessment data is fed back into the program planning process to ensure the continued quality and responsiveness of the *Workshops in the Workplace* program.

Key Points of Chapter Six:



ASSESS LEARNING & EVALUATE the PROGRAM

1) Clearly specify programwide objectives
2) Create internal standards and procedures for assessment and evaluation
3) Evaluate learner reaction, changes in knowledge and skills, changes in behavior and organizational impact for improvement and modification of the program
4) Use an array of instructor prepared program specific tools in addition to the commercially published instruments
5) Make the use of an external evaluator an integral component of the program
6) Build in a provision for the collection of baseline & follow-up data on outcomes
7) Use interviews to stimulate feedback.

CHAPTER SEVEN: PROVIDING SUPPORT FOR WORPLACE LITERACY- CONCLUSIONS & RECOMMENDATIONS

Providing Supports

Success in any workforce education program is integrally related to the rewards and supports given for participation. External rewards are for the most part beyond the capabilities of the sponsoring educational agency. Promotions and increased remuneration are largely dependent on the business partner and oftentimes not tangibly related to either participation or achievement in the program. There are however a variety of components that can increase motivation and reward the individual for participation. These rewards enhance learner acquisition of skills and strengthen the likelihood of the development of future self-directed educational behavior.

Rewards for Completion

Graduation

The BPDI ***Workshops in the Workplace*** program conducts a graduation ceremony for each training sequence. These ceremonies are found to be highly significant to the trainees. They vary dependent on the work site. In addition to the training staff, they often include representatives of the worksite partnership - employees, supervisors, (and sometimes even families); refreshments too may be provided.

Certificates

The ***Workshops in the Workplace*** project also grants "Certificates of Completion" for participation in the workshops. While these are symbolic gestures they help the trainee have closure and encourage future participation.

Establishing an Educational Resource Center

Each organization involved in the ***Workshops in the Workplace*** partnership set aside space for an Educational Resource Center. This Center minimally maintains pamphlets and books on furthering one's educational endeavors. Optimally these Centers afford access to learning materials, periodicals, books, instructional aides and technology (video, computers, cassettes, etc.), and so on. These further strengthen learning activities; they enable learners to retrieve additional relevant information and broaden their vocational and educational horizons.

Resource Centers can be used not only to further individual efforts, they can house computers for trainee self-instructional use. A Resource Center can also be used to serve as the base for the training staff at the work site.

The Resource Center is vital in the dissemination of information. As BPDI is a part of the CUNY system it has provided the sites' Centers with a wide array of counseling, vocational and career information, as well as information on instructional programs and services available at Bronx Community College and throughout the CUNY system.

Many of the Workshops in the Workplace participants have gone on to achieve their GEDs, continue ESL training at night, and even enroll in CUNY academic programs. At the worksite many employees have gone on to enjoy enhanced success obtaining promotions, higher titles and increased earnings.

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Other Instructional Support

In the Workshops in the Workplace project BPDI provides an Assistant Instructor who is proficient in ESL and Basic Skills Education, as well as 2 Bilingual Teaching Assistants. These individuals assist with instruction, interpreting, diagnosing needs, providing tutorial assistance, and obtaining ongoing feedback from participants. The provision of this kind of instructional support broadens the program's ability to meet individual learning needs and assures a high quality of ongoing feedback.

Linkages - "Train the Trainer"

Of great concern in all literacy programs is the continuity of educational training for the respective participants. While BPDI continues to enjoy great success in terms of positive expressions of learner reaction, supervisory satisfaction, overall employer satisfaction, it is still of overall concern that participants be able to continue to have the opportunity to upgrade their skills should the educational agency cease to be a provider. As the future of Federal funding for workplace literacy programs is at best an uncertainty, a unique component of the ***Workshops in the Workplace*** grant is the built in possibility to transfer the training to the business partner.

The later stages of the grant includes training business partner representatives in the ***Train the Trainer*** modules (see Chapter 2 for a description) and the ***Functional Context Approach***. Through the training of no less than 40 individuals (representing the four sites) interested organizations will be empowered to perform the Task Analyses, Literacy Audits & use the BPDI model in developing worksite specific training curricula for their own employees.

Further, BPDI sees part of the responsibility of any worksite literacy deliverer to be to provide continual needs assessment feedback to the employer. Through its integrated approach to literacy, BPDI learns (formally and informally) important and rich work site information and performance data that has proven to be invaluable to the business partner.

Providing Support

1) **Provide rewards to the participants for enrollment and participation**
2) **Establish learning resource centers to enable participants to continue individual learning and access resource information for continued educational and employment upgrading (in the community and on site)**
3) **Provide instructional support through the use of teaching assistants and bilingual aides**
4) **Build in mechanisms to ensure the continued identification of needs and delivery of services with or without grant funding.**

National Workplace Literacy Information System (NWLIS)

This computer-based data tracking system promises to provide significant information on the identification of "effects of participation in workplace literacy programs" and in the identification of program practices that help to "improve employees' functioning and enhance workplace productivity" (Mathematica, 1995, p. I-2). The program planner and administrator must realize that the completion of forms along with the data entry process is a major time consuming effort (with the ability to analyze the data internally through software at the worksite still somewhat limited).

The nature of the data collected should ultimately afford program administrators the ability to access important facts for internal monitoring,

program reporting and development. The capability to do this on an individual programwide basis has not as yet been actualized.

The long term future of this database for replication efforts is undoubtedly vitally important to educators as they seek to **identify exemplary practices** and learn of the **factors that facilitate or impede success in literacy instruction.** Literacy programs must, however, be careful to build in an adequate infrastructure for the collection and processing of the vast amount of necessary data; this process then becomes a large and complex administrative task.

BPDI's ***Workshops in the Workplace*** program is fortunate to enjoy a large, cooperative, experienced "in-kind" organization to assist in these tasks.

Continuing the Cycle

The assessment of the impact of Federal programs that target literacy needs of individuals has addressed everything from *"the impact on human capital, to the impact on basic skill gain, to social impact, to the impact on the attainment on personal goals, to affective impact"* (Beder, 1991, p. 107). Over the years our concept of literacy has changed significantly. It has ranged from the earlier definition as a reading, writing and computation functional level, to the ability to participate in society, to most recently a definition that includes on the job performance and success in employment. Ultimately how one defines literacy is instrumental to the identification of implementation strategies and the evaluation of success. A unifying program definition is thus critical to program design, establishment and operation.

BPDI has long felt that the conception of literacy is fluid - changing with the times. The more carefully one specifies the context in which skills are to be developed the more conscientiously one can define the requisite training the learner needs - to function and perform satisfactorily.

BPDI's ***Workshops in the Workplace*** project integrates the Task Analyses and Literacy Audits before defining the actual goals of site specific programs. BPDI has found that the setting of objectives is a complex task that must include: an acknowledgment of the learner's expectations and functional level (with respect to basic skills), the skills needed to perform on the job, and the employer's expectations. In addition it must be remembered that expectations, as well as job requirements, change over time and so on-going process evaluation and solid communications become two of the keys to success.

It is hoped that the experiences of BPDI in its ***Workshops in the Workplace*** program will be of value to other literacy programs seeking to deliver instruction through business and healthcare partnership arrangements. Similar to what Schon (1987) has termed an "artistry" of "reflective practice," BPDI has gained a wealth of knowledge through its **delivery efforts** and through a **reflection on improvement** of its workforce literacy programs. It cannot be emphasized enough that while there are practices that are common to each of the BPDI sites, it is to the **customization of service** and continued **on-going communication** that the program attributes its success to date.

Applications and Recommendations

Each chapter of this guidebook concluded with a set of summary factors considered important in the establishment of a successful workforce education program. BPDI has learned a number of important lessons in its history of providing workplace literacy. This last section just briefly recapitulates some of the significant variables found to be key in the healthcare and manufacturing industries. These are then itemized on the following and concluding page.

APPLICATIONS & RECOMMENDATIONS:

PROVIDING WORKPLACE LITERACY

1) Carefully Define the Partnership Objectives;
2) Ensure Positive Organizational Support for the Literacy Training Program through release time provisions, amenable space and ongoing contact through a Steering Committee;
3) Recruit, Train and Continuously Develop project staff in a worksite specific Functional Context Approach;
4) Assess Need through careful Task Analyses and Literacy Audits - include business partners, management, supervisors, labor and potential participants
5) Incorporate the principles of effective Adult Education Practice into the training program:
   ensure a positive physical and psychosocial climate,
   be responsive to the cultural, individual needs, & expectations of employees,
   use experiential and relevant instructional techniques,
   encourage participatory and collaborative processes, &
   enhance the critical reflectivity and independence of learners;
6) Customize the curriculum based around prioritized learning needs integrated with the basic skills;
7) Provide for the motivational needs of employees in organizing, scheduling and delivering instruction;
8) Be flexible - build in an adequate administrative structure to ensure compliance with mandated requirements and other emergent organizational demands;
9) Provide for homogeneity of job title in basic skills education training;
10) Aim for some heterogeneity of participant groups for the enrichment of instruction in teaming, problem-solving and decision-making training;
11) Build in formative and summative evaluation processes;
12) Include some external feedback - use an Evaluator in on-going instructional and programmatic assessment processes;
13) Provide instructional support through the use of program incentives, tutorial assistance and Resource Centers;
14) Plan for the continuity of instruction for participants - build into the planning transfer training for the partner organization;
15) Perceive the program on a journey of "continuous improvement" - an ever evolving process of defining and meeting the literacy needs of individuals in changing work organizations.

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APPENDICES -

RESOURCE MATERIALS

APPENDIX A: WESA SURVEY REPORTS

Bronx Lebanon Hospital Outpatient Clinic

Farberware Corporation

The Business & Professional Development Institute

Bronx Community College, CUNY

BRONX LEBANON HOSPITAL OUTPATIENT SERVICE

SURVEY RESULTS 3 Managers 12 Counselors

There was strong agreement between the survey results of supervisors and managers at the Methadone Maintenance Clinic. The primary areas which they said counselors need in the training program are:

1. **Writing**
   Counselors and supervisors agreed that the skill levels for documentation need to be improved. Many counselors indicated that they had difficulty keeping up with the charts due to their lack of good writing skills. Of the counselors and supervisors who responded, none thought the counselor's skills were *poor*, however, the maintenance of charts has a high priority as it does in any medical facility and, as one person indicated, "This is the kind of job we have to write every day and I believe I could improve better." We agree!

2. **Problem Solving and Reasoning**
   The clientele served by this clinic usually have multiple problems. Counselors felt they could benefit from models and case studies involving problem solving. Linked to this topic was time management because of the large case loads.

3. **Motivational Skills**
   Most of the counselors felt they needed to improve their motivational ability with regards to the clients and the supervisors.

4. **Team Building**
   - There have been many factors to inhibit team development in the clinic, including major staff changes, large case loads, and difficult clients. Learning the basics of team work may enhance the professional image of many of the counselors.

5. **Other**
   Counselors and supervisors agreed that professional image was one important topic to be included. Other items mentioned were: medical terminology, the engagement process, reward systems, educational resources, certificate procedures and leadership styles.

Prepared by: Dr. J. Juechter

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THE BUSINESS & PROFESSIONAL DEVELOPMENT INSTITUTE
Bronx Community College (CUNY)

WORKSHOPS IN THE WORKPLACE

Location: **Bronx Lebanon Methadone Clinic**
3100 Third Avenue
New York, NY

Training Topics Suggested by Employees:

1. Written Skills
2. Presentation Skills
3. Team Building
4. Problem Solving
5. Managing the Manager
6. Medical Terminology
7. Listening Skills
8. Professionalism
9. Documentation
10. Continual Patient Care
11. Effective Leadership
12. Patient Intervention
13. Critical Thinking
14. Employee Satisfaction/Reward

Prepared by: Dr. Doris Dingle

1/26/95

To: **Doris Dingle, Elaine Giardino, Valerie Lagakis**
Claude Grant

From: **J. Juechter**

Re: **BRONX LEBANON HOSPITAL OUTPATIENT CLINIC**
TASK ANALYSIS NOTES

Here are my notes from the discussions with the counselors and Christine Murray, Supervisor. Please correct or edit any errors in the information. I will give Monique relevant pages from the manuals to copy and create a packet for each of you; they will be VERY helpful. There seems to me more than 18 weeks of material!

Training Schedule

Friday: 9:00 - 11:00 am (To be approved by management)

Name

Workshops in the Workplace

Titles

1. Counselor 1 Counselor 2 Counselor 3
2. Social Worker Assistant
   Jose has just been promoted to this title.

Programs*

1. KEEP *Key Extension Entry Program
   Clients are people from prison who move into the programs
2. MMTP Methadone Maintenance Treatment Program
   General population for methadone treatment
3. Special Care HIV
   Wheelchair bound program which lasts 1 1/2 hours
   * 60% of clients are HIV positive

Educational Needs Expressed

1. GED with math tutoring
2. C.A.C. Certified Alcohol Counselor
3. Cocaine Addiction: Group Facilitation
4. NRD (?) 88 Hour Training

Work Schedules

Some counselors arrive at 6:30 am to begin their shift while others arrive at 7:00 am. The center closes at 4:00 pm. Friday is pay day and counselors have an extended lunch to go to the bank. Lunch is from 11:30 - 12:30 pm, however, someone must cover certain office areas.

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2

Training Needs

Survey Results are attached. As you will note, the managers rated the counselors much lower than the counselor's rated themselves in almost every case. What do we want to send to counselors and managers for discussion?

Discussion included:

1. Medical Vocabulary
2. Lack of appreciation of the staff. No rewards systems present
3. Resources for next educational steps needed
4. Effective presentation
5. Group facilitation: Specifically, how to start a group
6. How to get certified for group work
7. How do you create a professional image as a drug counselor?
8. Rapid turn-over in administration has created constant change in policies and procedures
9. Diagnostic Summary is not used consistently and counselors lack practice
10. Time management
11. Training for supervisors
12. Need for respect
13. Dealing with difficult clients
14. Managing your manager
15. Evaluation and advancement process for counselors
16. Giving and getting effective feedback
17. Stress and Burn out
18. Completing the documentation in the Charts
19. Learning more about the engagement process
20. Suicide
21. Working together as a team

Suggestions for Training Modules

Materials and Ideas

1. "One Minute" Journal Timed writing at the start of each class. Have an occasional contest to see who can write the most. (Rewards: Applause, candy, see below)
2. Counselor of the Week Based on class experience have group choose one person to be featured as Counselor of the Week. Take Polaroids of everyone at the beginning of class for use in the Conference Room (?) Poster
3. Certification applications for C.A.C., GED, and other programs

High Priority Topics In my view the following represent the best areas for enhancing their professional lives in the 18 weeks

1. Documentation/Writing
   Including grammar, style, responsibilities and timeliness
2. Team work
   Few of the counselors spoke about the need to work together as a team in the clinic.

3. Effective Presentation
   Including professional image, preparation and other items which demonstrate a professional awareness.

Vocabulary

Grand Rounds	Physician led discussions at the hospital on various topics
"Paper"	The process of getting a certificate or diploma

Opium Dependency

Dementia

Personality Disorders

Other

The items which I distributed at the last meeting also seem relevant including

1. Read and understand medical instructions
2. Communicate client status, both orally and in writing
3. Identify and resolve potential or actual problems in the clinic
4. Understand the relationship between actions and outcomes
5. Translate policies and procedures into actions
6. Accurately fill out comprehensive forms
7. Document and keep records
8. Recognize subtle changes in client behavior and health status and communicate these changes orally and in writing

The Business & Professional Development Institute

Bronx Community College, CUNY

BRONX LEBANON HOSPITAL
OUTPATIENT CLINIC COUNSELORS RESPONSE

SURVEY

Part 1

Please rate the ability of your staff to perform the following activities.

1. Reading	__Poor	_1_Fair	7_Good	_3_Excellent
2. Math	_1_Poor	2_Fair	5_Good	2_Excellent
3. Writing	__Poor	6_Fair	4_Good	1_Excellent
4. Problem Solving/ Reasoning	__Poor	2_Fair	8_Good	1_Excellent
5. Motivational Skills	1_Poor	4_Fair	5_Good	__Excellent
6. Speaking/Listening/ Communication	1_Poor	3_Fair	6_Good	1_Excellent
7. Team Building Skills	1_Poor	2_Fair	8_Good	__Excellent
8. Medical Terminology (3)				
9. Certification				
10. Time Management				

Part 2

If you were to choose the most important area of training, which one of the above would you select? Why?

First choices: Writing, (5) Problem Solving & Reasoning, (3) Motivational Skills, (4), Team Building, Speaking/Listening/Communicating,

---

Other Comments & Requests:
Understand Better MIPt

Writing because in this kind of job we have to write every day and I believe I could improve better.

Math: Why, lack of interest - not any motivation towards doing the work. Don't find it fun to do! Most important area of training may be to motivate clients to improve themselves.

A lack of continuity (changing administration) has prevented team building skills

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The clientele that we serve appear across the board, to have an enormous amount of problems as well as associated disorders. Knowing how to motivate them towards an objective goal of abstinence is need/wanted/ indicated.

As a primary therapist one must be able to reason things out in order to be effective with any attempt to service the hard-to-serve client.

Not take so long on keeping my charts up to date, due to my writing skills

Other Topics:
Support groups (Who to deal with it them), Videos on running groups, Managing our Management,
I have a very high degree in science from England and I have to make continuous attentive effort to follow up on communications.

Dr. J. Juechter
Dr. Doris Dingle

U.S. Department of Education

The Business & Professional Development Institute

Bronx Community College, CUNY

FARBERWARE CORP.

SURVEY RESULTS MANAGEMENT & UNION (5 PEOPLE)

Part 1

Please rate the ability of your staff to perform the following activities.

1. Reading	3_Poor	_2_Fair	__Good	__Excellent
2. Math	4_Poor	__Fair	__Good	__Excellent
3. Writing	3_Poor	_1_Fair	__Good	__Excellent
4. Problem Solving/ Reasoning	3_Poor	_3_Fair	__Good	__Excellent
5. Motivational Skills	3_Poor	_2_Fair	__Good	__Excellent
6. Speaking/Listening/ Communication	2_Poor	_3_Fair	__Good	__Excellent
7. Team Building Skills	3_Poor	_2_Fair	__Good	__Excellent

Part 2

If you were to choose the most important area of training, which one of the above would you select? Why?

MGR 1
1. Resolving Problems: Should come from people on line to bet a better buy in
2. Speaking/ Listen : This is the key to accomplish problem solving
3. Team Building: Working together must be understood
4. Motivational Skills: Breaking old ways of thinking
5. Computation: Simple math required

MGR 2
Line People: Need Team building and Motivational skills
Lead People: Need Problem Solving, Reading, Math and Writing
Supervisors: Need Problem Solving and Read, Math, Writing.

MGR 3
1. Reading
2. Writing
3. They need training in most of these areas

MGR 4
1. Team Building: Need to work together
2. Speaking, Etc.: Need for communication
3. Motivational Skills: Need to develop self starting skills
4. Problem Solving: Need to analyze
5. Math

MGR 5
1. Math: Production problems recurrent daily (multiplication & addition)
2. Speaking, Etc.: Foundation for team building, problem solving

Other comments: Need to move tickets for inventory and be able to write numbers

---

NOTES
1. Cells need to move toward less need for a a leader, titles, and more ability to work as a team
2. Some modules where leadership is emphasized could be attended by the LEAD people
3. A renewal seminar for all prior Cell participants could be useful to start up the program and regain initiative
4. Lots of mistakes are made in inventory. Currently, employees do not use calculators although they have to multiply often. A lot of mistakes are made at the loading docks, warehouse and in house inventory when "moving tickets". Employees are unable to figure out percentages.
5. Communication is poor in reporting out subpar quality of a product. Employees need to be able to describe the nature of the problem.
6. Redeployment is critical for keeping production lines moving. Understanding this need and responding are important.
7. Examples of problems:
   A. People working at different pace on the line
   B. Employees walk off the line
   C. Stopping the line without significant reason
8. Some workers are very isolated and have to work independently.
9. On one line a person might be very skilled. The question is, how do you get the next person, who is not performing, up to par?

Dr. J. Juechter
Dr. Doris Dingle

U.S. Department of Education

APPENDIX B: TRAINING OUTLINES/SCHEDULES

Bronx Lebanon Hospital

Cox & Company, Inc.

Farberware, Inc.

Kruysman, Inc.

The Business & Professional Development Institute
Bronx Community College (CUNY)

WORKSHOPS IN THE WORKPLACE

Bronx Lebanon Methadone Clinic — 10:30 a.m. - 12:30 p.m.
Third Avenue, Bronx, NY — Wednesdays

COURSE OUTLINE

Session	Date	Training Module
1	March 1	Team/Image Building
2	March 8	Team/Image Building
3	March 15	Team/Image Building
4	March 22	Task Analyses/ Documentation
5	March 29	Task Analyses/ Documentation
6	April 5	Task Analyses/ Documentation
7	April 12	Task Analyses/ Documentation
8	April 19	Recommendations
9	April 26	Psychosocial Summary/ Communication Skills
10	May 3	Psychosocial Summary/ Communication Skills
11	May 10	Psychosocial Summary/ Communication Skills
12	May 17	Leadership Styles
13	May 24	Oral Presentations
14	May 31	Oral Presentations
15	June 7	Listening
16	June 14	Diagnostic Summary
17	June 21	Job Satisfaction
18	June 28	Graduation Ceremony

Prepared by Dr. Dingle

The Business & Professional Development Institute
Bronx Community College

Workshops in the Workplace
Workplace English As A Second Language
15 Week Schedule

Cox & Company

March 8, 1995 through June 14, 1995 E. Giardino
tentative content list

Session 1	March 8, 1995	Introductions, establish the beginning of a working relationship, discuss English in the workplace & gather information to contribute to the design of future workshops.
Session 2	March 15, 1995	Self/team motivation for learning to use English in the Workplace, Workplace Fitness and Self-Evaluation.
Session 3	March 22,1995	Speaking & Listening
Session 4	March 29, 1995	Reading & Writing
Session 5	April 5, 1995	Communication & Critical Thinking
Session 6	April 12, 1995	Workplace Observations
Session 7	April 19, 1995	Ideas, Problems and Discussion
Session 8	April 26,1995	Problem Solving & Communication
Session 9	May 3, 1995	"Teaming" and Resolving Interpersonal Conflicts
Session 10	May 10, 1995	"Teaming" and Communicating Company-wide
Session 11	May 17, 1995	Review -My part in the Company
Session 12	May 24, 1995	Employee Benefits Overview
Session 13	May 31, 1995	Employee Benefits, Doing The Math
Session 14	June 7, 1995	Employee Benefits, Making Decisions
Session 15	June 14, 1995	Workshop in the Workplace: Taking a look at what I/We did & Taking a look at the changes.

WORKSHOPS IN THE WORKPLACE

Bronx Community College, CUNY

FARBERWARE, INC. TRAINING OUTLINE 18 SESSIONS

Dr. J. Juechter Elaine Giardino Wilma Rosario

DATES	TOPIC
2/21/95	Introductions and overview Learning to complete forms Introduction to Oral Communication Reporting a problem Initial brainstorming activitieson workplace problems
2/28/95	Review/Preview Employee writing sample Assessing employee workplace skills Workplace fitness Listening skills Practice
3/7/95	Review/preview Brainstorming for problem solving Model for problem solving Oral communication with supervisors Reporting a problem Dictionary use
3/14/95	Review/preview Decision making models Application to the job Improving employee - lead relations Experiential exercise Problem solving #2 Prioritizing
3/21/95	Review/preview Team development; experiential exercise Theory of team development Problem solving; next steps #3 Reality Testing Introduction to computation Cost of training
3/28/95	Review/preview Computation using the calculator Train-the-trainer calculator session Employees train each other on calculator use Increase understanding of company policy Cloze test Improve reading skills

4/4/95

Review/preview
Calculator use in the workplace (Counting product)
Vocabulary for calculator and computation
Reading company policy; Bereavement pay
    Improve workplace vocabulary
Writing sample #2 on workplace fitness skills

4/11/95

Review/preview
Calculator use continued
    Workplace computation problems
Reading company policy; Benefits
    Dictionary use
Next steps in problem solving #4 Creating consensus

4/18/95

Review/preview
Calculator and computation
    Problems
    Reading charts and graphs
    Post-test
Reading company policy manuals
    Cloze test

4/25/95

Review/preview
Complete calculator and computation
    Calculator post-test
    Constructing charts and graphs
Improve communication between employees
    Introduce T.A. module
    Role play

5/2/95

Review/preview
Application of T.A. to the workplace
Introduction to writing
    Memos
    Practice a vacation memo request
Reading practice memos

5/9/95

Review/preview
Completion of a second vacation memo
    Format for memos
Problem solving #5
    Setting priorities
    Taking action
Writing a draft memo to the company
    Practice

5/16/95

Review/preview
Review Draft # 1 of the company memo
    Employees re-write, edit, and approve memo
Company policy reading
    Earning vacation days
    Calculating vacation days

	Vocabulary and dictionary use
5/23/95	Review/preview Review Draft #2 of the company memo Understanding product construction (Reading) Cloze test Team Development: Exercise #2 Individual involvement
5/30/95	Review/preview Team Development; Experiential Exercise #3 Characteristics of effective teams Evaluating the "Farberware" team Completion and signatures for the safety memo Reading company policy and vocabulary
6/7/95	Review/preview Writing sample #3 Management discussion regarding the safety problem memo Action steps by employees Post-testing
6/13/95	Review/preview Post-test Content U.S. Department of Education Learner Assessment Form Planning graduation Oral presentations; outline Writing exercise; inviting guests, constructing the program Delivering the invitations
6/20/95	Summary of the training program Simple Evaluation Oral presentations from employees Graduations Management, supervisors, trainers, union representatives Certificate presentations

The Business and Professional Development Institute
Bronx Community College

Workshops in the Workplace
Workplace English As A Second Language
15 Week Schedule

Kruysman Corp.

February 23, 1995 through June 8, 1995 E. Giardino
content list

Session 1	February 23, 1995	Introductions, orientation and climate building
Session 2	March 2, 1995	Self/Team motivation for learning
Session 3	March 9, 1995	Self/Team evaluation of English practice Speaking/Listening
Session 4	March 16, 1995	Self/Team evaluation of English practice Speaking/Listening
Session 5	March 23, 1995	Self/Team 5 week self-progress assessment Reading & Writing/Communication
Session 6	March 30, 1995	President's response to letter re: buttons Reading & Writing/Communication
Session 7	April 6, 1995	Problem Solving/Brain Storming Reading/Communication/Group work
Session 8	April 20, 1995	Try English 1st Program Planning Reading/Communication/Group work
Session 9	April 27, 1995	Try English 1st Program Planning Writing/Communication/Group work
Session 10	May 4, 1995	Try English 1st Program Planning II Writing/Communication/Group work
Session 11	May 11, 1995	Try English 1st Program Evaluation, 1st Week Chemical Safety Hazards Communication/Group work
Session 12	May 18, 1995	Try English 1st Program Evaluation, 2nd Week Chemical Safety Hazards-review OSHA-safety measures & questions
Session 13	May 25, 1995	OSHA & Safety Hazards Communication-review Communication

Session 14	June 1, 1995	Post-testing & Evaluation Graduation Planning Communication/Group work
Session 15	June 8, 1995	Award decisions/ I/We did & Taking a look at the changes Graduation

APPENDIX C: WORKSHOP SESSION OUTLINES
(Samples)

Farberware Workshop #4

Bronx Lebanon Hospital Workshop #17

Kruysman Workshop #6

Cox & Company Workshop #14

WORKSHOPS IN THE WORKPLACE

The Business and Professional Development Institute

FARBERWARE: WORKSHOP 4

Topic:	Problem Solving in the Workplace
Performance Objective:	To resolve some of the problems between Lead people and assembly workers To learn decision making models To improve communication between leads and employees
Materials Needed:	Decision Making model Prior weeks brainstorming ideas
Motivation:	Both lead people and employees expressed an interest in improving communication and solving some of the problems which arise between the groups, e.g., • Lack of respect for lead people who are younger • Lack of respect from leads to employees
Development:	Separate lead and assembly line people Instructions for both groups 1. Brainstorm the primary problems with the the other group 2. List at least three things you would like them to do to make your job easier 3. Put these on the board 4. Report out and discussion
Review Activity:	Summarize the discussion Ask each person if they can commit to any of the items on the board
Application:	Improved discussion during the work hours Bridging the gap between leads and employees
Evaluation:	Both groups came up with significant suggestions which they noted "did not apply" to the people in the room. Leads were defensive at first and then participated attentively.

Dr. J. Juechter

WORKSHOPS IN THE WORKPLACE

The Business and Professional Development Institute

BRONX LEBANON: SESSION #17 June 21, 1995

MODULE 4 -- Listening Skills & Post-Test Assessments

Performance Objectives: In this sessions, the trainees will:

1. Evaluate how well they listen, identify barriers to effective listening, study techniques to improve active listening, and complete active listening worksheet.
2. Complete three post-test assessments.

Materials Needed: Folders/pads/pencils/
Handouts on Listening/Post-Tests

1. **Unison Activity**

   Complete "How Well Do You Listen" checklist.

2. **Motivation**

   Ask: "When do we really listen? Identify things we listen to; eg. television commercials, favorite songs, radio station; praises given to someone for his/her accomplishments.

3. **Application --**

   Identify listening barriers in the workplace and tools used to assist active listening.

4. **Development**

   Orally read from handout entitled, "Improving Listening Skills."

5. **Evaluation**

   Trainees:

   a. Evaluate their listening skills and identify what strategies they can use to improve effective listening at work.

   b. Identify effect of positive and negative body language on listening.

   c. Complete three-post test assessments.

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WORKSHOPS IN THE WORKPLACE

BASIC SKILLS/COMMUNICATION

KRUYSMAN CORP.

Session 6

Objectives:

Problem Solving: Prioritizing, Data gathering
Team Building cont.
Introduction/function of Organizational Chart
Initiate Oral/Written Brochure
Introduce "Kruysman Ambassador"

Training Outline

1. Problem Solving
   Review steps taken to prioritize
   Identify problem to be affected -
   Communication/Team Building
   Consider all possibilities and gather info re. each
   Trainer collects data from handouts on full job
   description and divides group into teams (by dept.)

2. Team members support each other in
   gathering/organizinag data
   Trainer illustrates relationship of teams utilizing
   flow chart

3. Trainer further develops chart by input form each
   team
   Teams initiates "Oral/Written Brochure" by expansion
   of information on flow chart

4. Introduce Ambassador handout
   Group reads information re. informing visitors
   Group develops vocabulary list from handout
   Teams begin to implement communication assignment

5. Close Session
   Use evaluation method
   Work assignment -Homework on vocabulary

6. Materials
   Chart Pad — Student Folders
   Kruysman Ambassador handout — Vocabulary
   Dictionaries

Dr. J. Juechter **Felicia Barnes**

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WORKSHOPS IN THE WORKPLACE
The Business & Professional Development Institute
Bronx Community College (CUNY)

COX & COMPANY, Inc. - Session 14 **June 7, 1995**

Module: **Written & Oral Assessments; Calculator; Course Assessment; Cox Specific Vocabulary**

Performance Objectives: In this unit, the trainees will:

1. Continue using the dictionary to look up definitions of words selected from Employee Benefits Manual in section titled, "Retirement."
2. Pronounce words and compose sentences as a group activity.
3. Identify three or four things they have learned during training and orally present what they have written.
4. Complete course assessment form with assistance of teachers.
5. Continue using the calculator to calculate contributions to the 401(k) savings plan.

Materials Needed: Word list; Cox & Company Vocabulary List; Calculators; Math Problems

1. **Unison Activity**

   Setting: Given the 14 training sessions in WESL, identiy three or four things you have learned, state what you liked best about the training, and write brief descriptions for each item.

2. **Motivation**

   Using written copy for #1 above, stand at the front of the room and orally present what you have written.

3. **Application**

   Continue using calculator to solve math problems from training session held last time.

4. **Development**

   Study definition of words used in performing specific tasks at work: accelerator; adhesion; adhesive; adhesive film; air-bubble void; ambient; study definitions and use words in other contexts.

   Group activity in using dictionary to look up definitions and compose sentences.

5. **Evaluation**

   A. Orally pronounce all words presented by the groups and define them.
   B. Enter sentences for words in their notebooks and read them.
   C. Assess effectiveness of training by describing what three or four things they have learned and orally report the things learned and what they liked best about the training.
   D. Use the calculator to solve basic math problems.

APPENDIX D: INSTRUCTIONAL MATERIALS - DECISION MAKING

Step 1 - What's My Style

How To Make A Good Decision

Farberware Decision Making Case Study

Decision Making - Vocabulary Fitness

A SKILL CALLED: DECISION MAKING # 1

One skill needed for Workplace Fitness is good decision making. People make literally hundreds of decisions every day. Examples of these include when to get up, what to wear, what to accomplish at work and how to deal with a family problem. Some people seem to have no difficulty making good decisions - others suffer through the process and never really feel comfortable with their decision.

This session will help you become more confident with decision making and provide information on your personal style of decision making and new ways to think about it.

STEP 1 WHAT'S MY STYLE?

Decision making is usually not taught in school or by our parents. We tend to model what other people do. Try to figure out which styles you use regularly.

Consider the following styles and then put numbers (1, 2 , 3) for the two or three styles you use the most.

1. **INTUITIVE** _____
   It feels right. Your gut impulse guides the decision.

2. **PLANNING** _____
   Using a rational approach but balanced with the emotional weighting of the facts. Takes time.

3. **IMPULSIVE** _____
   Very little thought or examination of the facts. You take the first alternative. Takes no time.

4. **DELAYING**
   Postponing thinking about it or taking action. Takes forever. _____

5. **FATALISTIC** _____
   Letting something else decide, leaving it up to fate Results are always a surprise.

6. **DEPENDENT** _____
   Let someone else decide. Follow someone else's plan.

STEP 2 DECIDE WHICH PROCESS IS THE MOST PRODUCTIVE WHY?

BRONX COMMUNITY COLLEGE, CUNY

WORKSHOPS IN THE WORKPLACE 1992

A SKILL CALLED: DECISION MAKING # 2

HOW TO MAKE A GOOD DECISION

1. **Identify the decision to be made**

2. **Gather information**
   (About yourself, the situation, or others)

3. **Identify the alternatives**

4. **Weight the evidence**
   (What are the risks and outcomes for each choice?)

5. **Choose the best alternative**

6. **Plan and take action**

7. **Review the decision**
   (Analyze and evaluate the results)

Practice: Think about a decision which you have to make in the near future. Which steps have you completed?

Dr. J. Juechter

WORKSHOPS IN THE WORKPLACE 1992

FARBERWARE

A SKILL CALLED: DECISION MAKING # 3

CASE STUDY

Instructions: Use the Decision Making Steps and help Jaime to resolve the following problem.

An Employee's Dilemma

At 10:30 Jaime knew something was wrong. Two people had left the line without explanation and the supervisor had a meeting upstairs.

The welding machine had gone down briefly during the same period and now there was a huge backlog of pans to complete. Some were falling on the floor and would surely be seconds or scrap.

No one else in the cell seemed concerned as they were busy chatting about the party on Saturday. Jaime surveyed the situation and wondered what to do.

What should Jaime do?

Dr. J. Juechter

BRONX COMMUNITY COLLEGE, CUNY

WORKSHOPS IN THE WORKPLACE 1992

A SKILL CALLED: DECISION MAKING

JUST IN CASE..... VOCABULARY FITNESS

1. **INTUITIVE**
   The Ability to understand facts or truths quickly without any reasoning process. Quick insight.

2. **PLANNING**
   To use a systematic approach or a procedure to accomplish a goal.

3. **IMPULSIVE**
   Driving forward without serious thoughts. Acting quickly, often on an emotion.

4. **DELAYING**
   To put off, or postpone an action or decision. Slowing down a situation.

5. **FATALISTIC**
   The belief that all events are pre-determined and, thus, unavoidable.

6. **DEPENDENT**
   One relying on another for support. Unable to take action on your own.

Dr. J. Juechter

APPENDIX E: INSTRUCTIONAL MATERIALS - BRAINSTORMING

Brainstorming Instructions

Farberware Cell #1 Problems to Solve

Brainstorming Problems in the Workplace

Memo Re: Employee Chair Problem

BRAINSTORMING

The person who writes the ideas needs to put everything up on the board or on paper. Keep every idea given.

1. **NO CRITICISM**
   Suspend your judgment - don't be critical of your own, or other people's ideas.

2. **BUILD ON OTHER PEOPLE'S IDEAS**
   Add to another person's contribution

3. **FREE WHEELING SUGGESTIONS ARE WELCOMED**
   Be as wild and creative as possible. Reality checks come later.

4. **QUANTITY IS NEEDED**
   The greater the number of ideas, the greater the chance of getting a good idea. If the ideas stop flowing - stop, rest, start again.

5. **COMBINE IDEAS**
   Take two ideas and put them together

LATER

After everyone has determined that all possible ideas are out, brainstorm each of the ideas written down. Eliminate the ones which are not useful. Prioritize the others and then start on an action plan.

WORKSHOPS IN THE WORKPLACE

FARBERWARE CELL #1

Problems to solve at farberware:

1. Too close to work: finishing line
2. Inside wipe-aluminium
3. Grinding machine-pollution
4. Rotary & bottom grind are too close
5. Conveyer bilt too short
6. Hot weather: hard to use masks
7. Pots too hot to handle
8. When machines break down-stop whole line
9. Lock of experienced workers need more training
10. Too many dents & blisters
11. Lines are running with no inspectors (before finish line)
12. Sizes are different in pots (high, low, light, &heavy) grinding machine breaks, quality is reduce

WORKSHOPS IN THE WORKPLACE

FARBERWARE, CORP

BRAINSTORMING PROBLEMS IN THE WORKPLACE

If I were President of Farberware, I would change....

1. **Create a parking space for employees and guests** √
2. **Fix the leaky roof** √√√√√
3. **Change the union** √√√√
4. **Improve the supervisors and managers**
5. **Change the administration of the company** √√
6. **Blowers on Units 3 and 4 are not working** √√√
7. **Foremen need training**
8. **Lead people give their friends, or special relationships the easy jobs**
9. **All employee restrooms are dirty and need upgrading**
10. **Leads don't know the jobsddd**

FARBERWARE Inc.
BRONX, N.Y.

TO:
Mr. Pete Spring

FROM:
CELL TEAM #1 & Night Shift

RE:
EMPLOYEE CHAIR PROBLEM

"CELL TEAM #1" would like to thank you & the company for the special opportunity to attend regular training sessions. As a result of our new information we would like to present ideas to solve one of the most persistant plant problems - chairs for cell lines. Our Ad Hoc Committee would like to meet with you and with Mr. Palmer for a brief meeting in class to discuss some of these solutions and start to resolve the issue.

PROBLEM STATEMENT
The current assignment of chairs to employees is inefficient. Chairs are locked in place in the plant and there are never enough of the right kind of chairs for the skilled people. For example, welders need the proper chairs to do their jobs. There need to be raised or lowered to adjust to the equipment.

Every shift must search for itself and without a system in place employees have taken to locking their chairs in place or removing them. In addition chairs and equipment disappear making the job of the floater harder.

The Employee Chair problem causes problems every day, especially for the night shift. If it is not addressed Farberware suffers. Here are some of the results.

- A continual loss of production which the company cannot afford
- Creates constant Interpersonal Conflicts between employees all over the plant
- Promotes other bad feelings and trouble in CELL TEAM 1
- Loss of Time for Shift supervisors as well as the workers
- Headaches for night shift

BRAINSTORMING IDEAS
In a recent session we learned how to brainstorm creatively. Here is the list which was developed during the class.

1. Employees Take their chair home.
2. Employees Take the seat home.
3. Assign a chair to each person.
4. Put each person's name on chair.
5. Design chair that attaches to our wrapping table.
6. Get enginers to design a good table/chair which swivels but stays together.
7. Bring a cushion for hard chairs or provide pillows for hard chairs.
8. Employees could Buy own chairs.
9. Build a storage box for chairs in CELL TEAM 1 and we will store them.
10. Only the persons who needs chair picks it up from the storage place
11. One person in charge to take chairs in & out.
    One person per Department , nite & day.

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12. Stop work until chair situation is settled
13. Set up a system which works for the whole plant not just CELL TEAM 1
14. Buy more of the most useful chairs. (Raise and lower, rollers, comfortable for whole shift)
15. Break & remove the locks.
16. Give key to night shift supervisor.
17. Procedure: Go to the office of the Supervisor /manager and report the problem, get help.
18. Set up new rules for chairs, Example: no locks attached.
19. Supervisor's have charge of their chairs & put them back regularly into the storage.
20. Get a Contribution of chairs from furniture store or maker.

We would appreciate a response to our request for a specific meeting to discuss this situation.

Thank you.

AD HOC COMMITTEE

CELL TEAM #1

cc: Mr. Dennis Palmer

APPENDIX F: INSTRUCTIONAL MATERIALS - MEMO WRITING

Bronx Lebanon Sample Memo

Memo Model

Memo Form

Writing A Good Memo

Memo Magic

WORKSHOPS IN THE WORKPLACE

BRONX-LEBANON HOSPITAL

SAMPLE MEMO

TO: All Staff

FROM: The Supervisor

SUB: Staff Bathroom

DATE: Any Day

I am always shocked at some of the things I have seen in the bathroom and disappointed when things are taken from the bathroom. But when someone dumped dirt into the sink, I became angry!

I have never asked anyone to clean the bathroom though I occasionally clean it myself and there are others on staff who have taken on the responsibility of keeping it clean. I thank those staff members for their kindness.

We had to plead with the plumber to fix the problem that the dumping of dirt caused. I hope that from here on in everyone will be more conscientious and pitch in by helping to keep your bathroom clean.

Please! Do **not** leave dirty cups, dishes and utensils in the sinks. While the plumbers were fixing the sink they pulled out knives, forks, drinking straws and all kinds of disgusting things from the sink.

Thank you for your assistance; remember, this is **your bathroom.**

Edited: Dr. J. Juechter

WORKSHOPS IN THE WORKPLACE

BRONX LEBANON HOSPITAL

MEMO MODEL

TO: Write in All of the People who are concerned, address it to a group of people:
The Department
Night Shift Personnel

FROM: This lists the sender(s) Sign your name or initials next to the printed words

SUBECT: Briefly state the subject of the Memo. Examples:
Reason for Chart Changes
New Schedules

DATE: This is the day you write the memo

Suggestions:

1. Write the most important information in the first paragraph. Don't wait to the end of the memo to make your point.

2. Keep memo's brief. One or two paragraphs are sufficient.

3. Demonstrate courtesy and politeness on paper. Examples:
   Please
   Thank you
   I appreciate.....

4. If you would like a response indicate this to the receiver.
   RSVP by next Tuesday.
   Let me know on Monday.
   Please notify your everyone.....

5. Check your spelling and grammar. Remember. This is forever!

Developed by : Dr. J. Juechter

WORKSHOPS IN THE WORKPLACE

BRONX-LEBANON HOSPITAL

MEMO FORM

TO:

FROM:

SUB:

DATE:

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BRONX LEBANON HOSPITAL

WRITING A GOOD MEMO

When you write to anyone about important matters, (Vacation request, Leave of absence, Payment due) consider the following format

1. THE DATE
   Put the date at the top of the document. You can write it out or use numbers (3/14/95)

2. NAME OF THE PERSON (ADDRESSEE)
   It is more useful to include the person's name rather than the impersonal "To Whom It May Concern".

3. YOUR NAME plus identification such as TITLE, SOCIAL SECURITY NUMBER (if appropriate)

4. TOPIC OR SUBJECT
   State the reason for the memo in the first line

5. STATEMENTS ON THE TOPIC
   The body of the memo should state what, why, where, who, or any basic information to help the person understand your intention.

6. POLITE CLOSING,
   Express your appreciation or expectations

7. SIGNATURE
   Many people will not read a document that is unsigned

J. Juechter Elaine Giardino Doris Dingle

WORKSHOPS IN THE WORKPLACE

FARBERWARE INC.

MEMO MAGIC

WHEN WRITING A MEMO REMEMBER TO....

- PUT THE DATE DOWN
- INCLUDE THE WHOLE NAME OF THE PERSON
- BE ACCURATE
- WRITE CLEARLY
- GET TO THE POINT
- GIVE YOUR REASONING
- INCLUDE YOUR SIGNATURE
- BE POLITE ON PAPER

Dr. J. Juechter

APPENDIX G: INSTRUCTIONAL MATERIALS - CALCULATION MODULES

Bronx Lebanon Calculator Lesson 1 Vocabulary

Calculator Problems

Calculator Check Up

Farberware Skid Assignment

Farberware Vocabulary & Technical Terminology

Estimating the Training Class Cost

CALCULATOR LESSON 1

Bronx Lebanon Vocabulary

English	Spanish
1. Work Words	Trabajo Palabra
2. Calculator	Calculadora
3. Percent %	porciento
4. Team Work	equipo de trabajo
5. Division	division
6. Multiply	mutiplicar
7. Chart	tarjeta

CALCULATOR PROBLEMS

Bronx Lebanon Hospital

1. Maria has to work 8 hours on Easter Sunday. She gets 2 1/2 times her regular rate of $10.00 Hour.

   How much money will she make on Easter Sunday before deductions?

2. The dietary group has set up _89__ of the Lunches for patients. They need to prepare 453 lunches.

   A. What percent of the lunches are completed?

   B. If they have 3 more hours to prepare lunches,how many will they have to complete per hour to feed everyone.

CALCULATOR CHECK UP

Dr. J. Juechter

Training Room Problem: The following chart was near production line this morning.

8:00 - 9:00 am	198 products	
9:00 - 10:00	38 products	(Welding Machine Broken)
10:00-11:00	256 products	
11:00-12:00	78 products	(Lunch Break)
12:00-1:00 pm	212 products	
1:00 - 2:00 pm	304 products	
2:00 - 3:00 pm	287 products	(Two people sick, left line)
3:00 - 4:30 pm	289 products	

Use your calculator to figure out -

1. The TOTAL number of products made on this day.

TOTAL_____

2. The percent of the daily production completed in the last hour.

LAST HOUR_____%

3. If production were down by 15%, how many products would be made for the day?

NUMBER OF PRODUCTS_____

FARBERWARE, INC.

SKID ASSIGNMENT **Calculator Lessons**

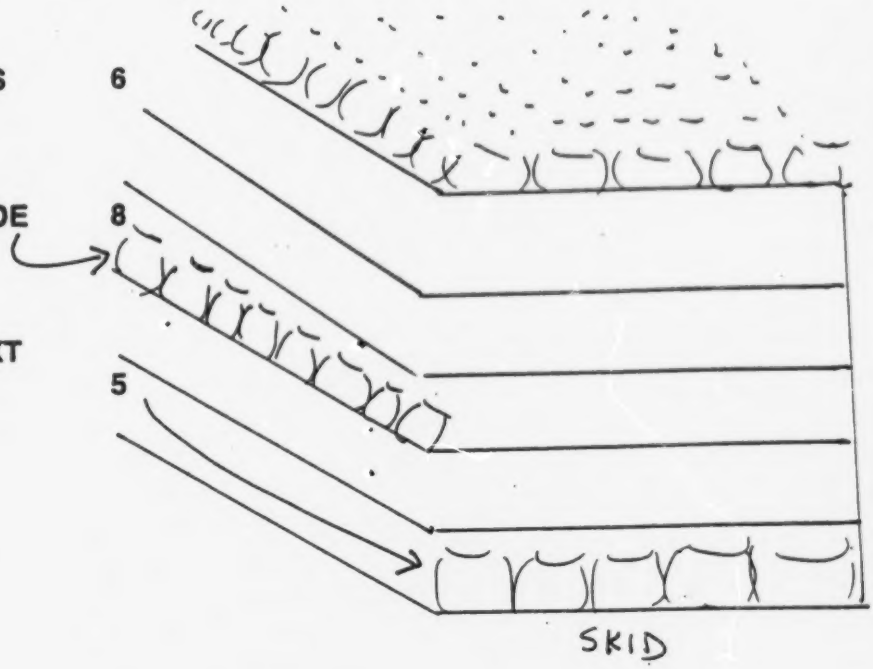
Eduardo is checking the number of products on one skid. They are going to the loading dock for shipment to a cooking school. The school needs 480 pieces.

Use your calculator to help him figure out whether the correct number in being shipped.

NUMBER OF LAYERS **6**

COUNT ON ONE SIDE **8**

COUNT ON THE NEXT SIDE **5**



TOTAL NUMBER OF PRODUCTS_____

Is the order being shipped correctly?

Dr. J. Juechter

The Business & Professional Development Institute

Bronx Community College, CUNY

COMPANY FARBERWARE

VOCABULARY & TECHNICAL TERMINOLOGY PAGE 1

TERM	DEFINITION
LEAD	
SET LINE	
LOADING DOCK	
SKIDS	
HOME GROUP	
PERK LINE	
ELECTRICAL ASSEMBLY	
OPEN STOCK	
MANUAL SET LINE	
MACHINE OPERATOR	
M.R.P. SYSTEM	
BONDING	
HI LOW	
MILLENIUM	

Dr. J. Juechter
Dr. Doris Dingle

U.S. Department of Education

WORKSHOPS IN THE WORKPLACE
FARBERWARE CO.

How much does this training class cost?

Class Estimate: $6,000 - $30,000

Costs:

Employees	18 wks x 15 people x 2 hrs x $10.00	= $5,400.00
Trainers	18 wks x 3 people x 3 hrs x $30.00	= $4,860.00
Supplies	15 people x $15.00	= $ 225.00
Heat/Electric for 4 1/2 months		= $ 450.00
Loss of Productivity		
500 Pieces (2 Hours) x $90 Per Millenium x 18 wks		= $ 810,000.00
	TOTAL	$ 820,935.00
Per Person Cost		$ 54,729.00

Dr. J. Juechter Elaine Giordino Sally Hernandez

APPENDIX H: INSTRUCTIONAL MATERIALS - PROBLEM MODULE

Reporting a Problem

MODULE REPORTING A PROBLEM

Can you name a single day on the job without a problem?
No one can!

Here is an approach to commonplace problems for use at work or home.

STEPS

1. **POLITE OPENER**
   Example: "Excuse me. I have a problem here".

2. **STATING THE PROBLEM**
   Example: "My machine is broken".

3. **ASKING FOR HELP**
   Example: "What should I do?"

PRACTICE
Here are some other examples. Practice Reporting a Problem.

1 You ran out of materials and don't know where to get them.

2. Your special earplugs are lost and you can't work without them.

3. You feel sick to your stomach.

4. You can't remember what your supervisor said to do.

5. Real Problem from your job._____

APPENDIX I: ASSESSMENT MATERIALS

WESL Language Levels

Content Multiple Choice Pre Test

Farberware Post-content (Pre & Post) Test

CLOZE Tests

Benefits & Dues

No Fault Attendance

Farberware Construction Manufacturing Process

WORKSHOPS IN THE WORKPLACE

BRONX COMMUNITY COLLEGE, CUNY

WESL LANGUAGE LEVELS

This a a level evaluation which some groups use for pre- and post-testing of trainees. Would this be appropriate for our use?

LEVEL 1

Non-speaking English person. This individual does not speak the language, however, they may understand certain words or phrases.

LEVEL 2

Individual who uses simple phrases with the present tense. As they move through this level they begin to use the past tense.

LEVEL 3

Speaker is able to move through all tenses. Learner is able to use present, past and future tenses along with appropriate adjective, adverb and word endings with some errors

LEVEL 4

Fully communicates in English. Individual is able to pass the appropriate English tests.

J. Juechter

Content

Multiple Choice

Instructions: Put all the answers on the Answer Sheet using a pencil.

1. Some decision making styles are more useful than others. Which of the following styles is usually more effective than the other?
   - A Impulsive
   - B Planning
   - C Fatalistic
   - D Dependent
   - E Complimentary

2. Which of the following is NOT one of the guidelines for Active Listening?
   - A Probe
   - B Reflect
   - C Challenge
   - D Summarize
   - E Brainstorm

3. If a person has an impulsive, temper tantrum on the job it is their _____ personality at work.
   - A Adult
   - B Child
   - C Teen Age
   - D Parent
   - E Grandparent

4. Critical thinking includes
   - A Thinking rationally
   - B Having creative ideas
   - C Solving problems
   - D Testing ideas
   - E All of the Above

TRUE/FALSE

5. Transactional Analysis is a classic team building technique

6. An easy communication system can help with reporting problems in the workplace

CASE STUDY

Read the Passage below carefully. It is followed by 6 incomplete questions. Choose the best answer and put the correct answer on the answer sheet.

Each employee has ten vacation days during the first five years of work. After five years, employees have four weeks vacation. Advance vacation checks must be requested from the department at least one month in advance of the date required.

After one month of full-time employment, each employee is eligible to use sick leave. Sick leave is accumulated at the rate of one day per month from the date of hire up to a maximum of twelve days per year. In addition, each employee may take four personal days a year. Personal days and vacation days must be approved in writing by a supervisor.

As soon as an employee knows s/he will be absent or late, s/he must inform the supervisor. In cases of extended illness, definite arrangements to report periodically are to be made. Employees are expected to be on duty at the time scheduled. Tardiness and absence put extra burdens on the other employees who are working.

7. What is this passage about?
   a consideration on the job
   b time and leave policies
   c being late

8. If an employee working two years takes 1/4 of their vacation, how many days does s/he take?
   a 2 1/2
   b 4
   c 4 1/2

9. Where does this passage come from?
   a a letter requesting vacation
   b an employee manual
   c a disciplinary memo

10. What should I do if I'm going to be out sick for a long time?
    a let my supervisor know
    b contact my co-workers periodically
    c let my supervisor know and contact him/her regularly

11. After six years, I have my supervisor's approval to take my vacation and personal days together. How many days can I take?
    a 24
    b 14
    c 32

12. What does the word tardiness mean in the passage?
    a lateness
    b excessive lateness
    c lack of consideration

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WORKSHOPS IN THE WORKPLACE

NAME_____ FARBERWARE, INC.

WHAT DO I REMEMBER? POST-CONTENT

1. Choose the correct answer for each of the 10 questions.
2. Then, talk with your team members to agree on the answer.

QUESTION	MY ANSWER	TEAM ANSWER
1. In **active listening** we must probe and reflect but NOT A. Concentrate B. Clarify C. Challenge D. Comfort	_____	_____
2. In **reporting a problem** it is important to remember to: A. Have a polite opener B. State the problem C. Ask for help D. All of the above	_____	_____
3. **Brainstorming** is important when a person or group want to: A. Find a creative answer B. Communicate to your supervisor C. Computing your paycheck D. Get even	_____	_____
4. Which of these is **NOT** a **calculator** function? A. Division B. Multiplication C. Subtraction D. Addition E. Correcting grammar	_____	_____

Questions	My Answer	Team Answer
5. Which of the following items is most important in **writing a memo**? A. An exact outline B. Putting Mr., Mrs., Ms. in front of the person's name C. Adding your signature D. Omitting the date	_____	_____
6. In **Transactional Analysis (TA)** the three parts of the personality are: A. Parent, Grandparent, Sister B. Parent, Adult, Child C. Adult, Cousin, Parent D. None of the above	_____	_____
7. **TA**. believes that the best supervisor communications are as a: A. Parent B. Child C. Adult D. Manager	_____	_____
8. **Team work** depends upon A. Clear communication B. Employees understanding the task C. Trust in the work team D. All of the above	_____	_____
9. The information an employee needs to **understand their rights** is: A. On the bulletin boards B. In the Company Policy Statements C. In the Union Contract D. B & C	_____	_____

Workshops in the Workplace **Post-content**

Questions	My Answer	Team Answer
10. Daily pay is given in which of the following cases? A. 3 days for death in the immediate family B. 13 Holidays C. Employees birthday D. All of the above	_____	_____
TRUE FALSE Write T or F		
11. The company gives more than $1000.00 per employee for Health Benefits.	_____	_____
12. All dictionaries can tell you the pronunciation, definition and translation in Spanish of a word.	_____	_____

Dr. J. Juechter **June, 1995**

WORKSHOPS IN THE WORKPLACE

Farberware, Inc.

Basic Information for Employees of Farberware, Inc. a Hanson Industries

INSTRUCTIONS: FILL IN THE BLANKS!

BENEFITS & DUES in the CONTRACT

Under our contract with the ....Teamster, Local ____, the employee is required to join the union after _____ days of employment. The current benefits provided by the union pursuant to our contract with them are shown, in brief, below.

1. The company pays the _____ over _____ per year for each employee. as a result of these payments the union provides
   A. Hospitalization and _____benefits for employees and their dependents who meet the contract requirements.
   B. Supplemental _____ benefits
   C. Life insurance and
   D. _____ plan on retirement for employees who meet the contract requirements

After the employee has had _____months or more of employment, the employee and his or her covered dependents are entitled to_____ medical care at the Union Medical Center.

New employees pay the union an initiation fee of _____, payable in three (3) installments, after _____days of employment. In addition, dues in the sum of $17.00 are payable monthly by the employee to the union. These payments are _____ from the employee's pay check.

Dr. J. Juechter

WORKSHOPS IN THE WORKPLACE

Farberware, Inc.

Basic Information for Employees of Farberware, Inc. a Hanson Industries

BENEFITS & DUES in the CONTRACT

Under our contract with the ....Teamster, Local 815, the employee is required to join the union after thirty days of employment. The current benefits provided by the union pursuant to our contract with them are shown, in brief, below.

1. The company pays the union over $1000.00 per year for each employee.

as a result of these payments the union provides

A. Hospitalization and surgical benefits for employees and their dependents who meet the contract requirements.

B. Supplemental disability benefits

C. Life insurance and

D. Pension plan on retirement for employees who meet the contract requirements

After the employee has had 6 months or more of employment, the employee and his or her covered dependents are entitled to major medical care at the Union Medical Center.

New employees pay the union an initiation fee of $50.00, payable in three (3) installments, after thirty days of employment. In addition, dues in the sum of $17.00 are payable monthly by the employee to the union. These payments are deducted from the employee's pay check.

Dr. J. Juechter

WORKSHOPS IN THE WORKPLACE

MODULE 9 **Farberware**

NO FAULT ATTENDANCE POLICY

General Attendance Rules
CAN YOU FILL IN THE BLANKS?

2. 0
IN ALL CASES EXCEPT IF AN EMPLOYEE IS _____ AND IN A BED, UNEXCUSED ABSENCES OF _____CONSECUTIVE WORK DAYS WITHOUT CONTACTING YOUR IMMEDIATE SUPERVISOR OR THE _____DEPARTMENT WILL BE INTERPRETED BY FARBERWARE AS A VOLUNTARY _____.

2. 1
ANY EMPLOYEE WHO LEAVES WORK BEFORE THE END OF HIS OR HER SCHEDULED _____ WITHOUT FIRST NOTIFYING HIS IMMEDIATE SUPERVISOR OR THE PERSONNEL DEPARTMENT IS ASSUMED TO HAVE ____ AND WILL BE _____ .

2.2
EMPLOYEES WHO HAVE CONTACTED THE _____ DEPARTMENT AND HAVE BEEN ABSENT FOR OVER _____ SCHEDULED WORK DAYS MUST GIVE AN APPROVED _____ TO THE PERSONNEL OR MEDICAL DEPARTMENT _____ RETURNING TO WORK.

2.3
ALL EMPLOYEES RETURNING TO WORK AFTER BEING ON _____ ILLNESS, DISABILITY OR _____ MUST RECEIVE WRITTEN APPROVAL FROM THE FARBERWARE _____ OR PERSONNEL DEPARTMENTS BEFORE BEING ALLOWED TO WORK.

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FARBERWARE CONSTRUCTION

What do you know about your company's manufacturing process? Fill in the blanks.

Materials

Farberware Cookware is made of _____ _____ with a thick layer of aluminum bonded to the bottom. This combination gives the best features of both metals - aluminum for quick and even heat distribution; _____ _____ for _____, durability and easy _____ .

Cover

The cover is made of the same _____ _____ as the cookware and may be used i_____ with other pieces of Farberware. The cover has a _____ edge and is close fitting.

Handle and Knob

The comfortable handle and knob are of heat-_____ material. They are securely attached, but can be replaced if necessary.

Rim

The rim is firmly rolled for _____, safety and easy cleaning. There are no sharp _____ .

Finish

The sparkling, _____ _____ finish goes with everything in the kitchen and is to _____ when adding additional pieces later.

FARBERWARE CONSTRUCTION

What do you know about your company's manufacturing process? Fill in the blanks.

Materials

Farberware Cookware is made of STAINLESS STEEL with a thick layer of aluminum bonded to the bottom. This combination gives the best features of both metals - aluminum for quick and even heat distribution; STAINLESS STEEL for BEAUTY, durability and easy CLEANING.

Cover

The cover is made of the same STAINLESS STEEL as the cookware and may be used INTERCHANGEABLE with other pieces of Farberware. The cover has a ROLLED edge and is close fitting.

Handle and Knob

The comfortable handle and knob are of heat- RESISTANT material. They are securely attached, but can be replaced if necessary.

Rim

The rim is firmly rolled for SANITATION, safety and easy cleaning. There are no sharp EDGES.

Finish

The sparkling, STAINLESS STEEL finish goes with everything in the kitchen and is to MATCH when adding additional pieces later.

DR. J. JUECHTER **MAY 95**

APPENDIX J: NWLIS ASSESSMENT & OUTCOME FORMS

Learner Assessment Form

Outcome Form

LEARNER ASSESSMENT FORM

1. **Name:**

_____ _____
(Last) (First)

2. **Social Security Number:***

|_|_|_|-|_|_|-|_|_|_|_|

3. **In the future, do you plan to take any of the following courses?**

(MARK ONE ON EACH LINE)

	Plan to Take	Do Not Plan to Take
A basic skills course in reading, writing, or math	☐	☐
A course in using English (such as ESL)	☐	☐
A computer course	☐	☐
A GED course or the GED exam	☐	☐
Courses to get an occupational certificate	☐	☐
A job training course	☐	☐
Courses leading to a 2-year or 4-year college degree	☐	☐
A home-study course	☐	☐
Other (*Please Specify:* _____)	☐	☐

* Giving us your Social Security number is completely voluntary and there is no penalty for not disclosing it. It is needed so that any information obtained later gets correctly matched with the same individual; your identity will be removed from all records once this match is made. We are authorized to ask these questions by Section 406 of the General Education Provisions Act (20 USC 1221e.1).

4. Since this course began, have you:

	(MARK ONE ON EACH LINE) Yes	No
Learned what you wanted to learn in this course?	☐	☐
Changed your educational or career goals?	☐	☐
Had more responsibility added to your job?	☐	☐
Moved to a shift you prefer?	☐	☐
Switched from part-time to full-time?	☐	☐
Received a pay raise?	☐	☐
Been promoted?	☐	☐
Received an award, bonus, or other special recognition on your job?	☐	☐
Received your GED?	☐	☐
Applied for a new job?	☐	☐
Started a new job at another company?	☐	☐
Been laid off?	☐	☐
Left your job for any other reason? (*Please Specify:* _____)	☐	☐

5. Please rate your ability to perform each of the following activities:

	(PLEASE MARK ONE RESPONSE FOR EVERY ACTIVITY) Poor	Fair	Good	Excellent
Read English	☐	☐	☐	☐
Understand English	☐	☐	☐	☐
Speak English	☐	☐	☐	☐
Write in English	☐	☐	☐	☐
Work as part of a team	☐	☐	☐	☐
Use math	☐	☐	☐	☐
Solve problems/use reasoning	☐	☐	☐	☐

BEST COPY AVAILABLE

OUTCOMES FORM

OMB No.: 1875-0105
Expires: Nov. 30, 1997

1. Course Number: _____

2. Course Name: _____

3. Instructor's Name:

_____ _____
(Last) (First)

4. Name of Test or Assessment Measure: _____

5. Date Pre-Test Administered: |__|__|/|__|__|/19|__|__|
Month Day Year

6. Date Post-Test Administered: |__|__|/|__|__|/19|__|__|
Month Day Year

7. Is this assessment measure:

(MARK ONE BOX)

01 ☐ A nationally-available standardized test?
02 ☐ A customized test?
03 ☐ A job-specific skill competency rating?
04 ☐ A monitored group or one-on-one interview?
05 ☐ Other (*Please Specify:* _____)

NAME OF LEARNER	PRE-TEST SCORE	PRE-TEST NOTES	POST-TEST SCORE	POST-TEST NOTES	IN THIS COURSE, WOULD YOU SAY THIS LEARNER PERFORMED:	COMMENTS
					(MARK ONLY ONE BOX) 01 ☐ At a satisfactory level? 02 ☐ Above a satisfactory level? 03 ☐ Below a satisfactory level?	
					(MARK ONLY ONE BOX) 01 ☐ At a satisfactory level? 02 ☐ Above a satisfactory level? 03 ☐ Below a satisfactory level?	
					(MARK ONLY ONE BOX) 01 ☐ At a satisfactory level? 02 ☐ Above a satisfactory level? 03 ☐ Below a satisfactory level?	
					(MARK ONLY ONE BOX) 01 ☐ At a satisfactory level? 02 ☐ Above a satisfactory level? 03 ☐ Below a satisfactory level?	

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Notes & Comments:

QUESTIONS:

WORKSHOPS IN THE WORKPLACE

PRESENTERS:

Claude D. Grant, M.S., Project Director
The Business & Professional Development Institute
Bronx Community College
The City University of New York

Natalie Hannon, Ph.D., Project Liaison
Training and Staff Development
Bronx-Lebanon Hospital Center

Doris D. Dingle, Ed.D., Consultant/Trainer
The Business & Professional Development Institute
Bronx Community College
The City University of New York

The Eddy/Northeast Health and Rockefeller College Symposium
"Workplace Education in the Healthcare Environment:
The Why, The What, and The How"

November 13, 1997 – The Margaret W. Krause Center
Troy, New York

THE BUSINESS & PROFESSIONAL DEVELOPMENT INSTITUTE
of Bronx Community College
The City University of New York

WORKSHOPS IN THE WORKPLACE
A Workforce Education Project
Health Care & Manufacturing
1992 - 1997

CHRONOLOGY

1992-1993	**1-year funding from the U.S. Department of Education/National Workplace Literacy Program to work with BRONX LEBANON HOSPITAL CENTER and FARBERWARE, INC.**
1993-1994	**Funded by the 1199 HOSPITAL WORKERS UNION and the TEAMSTER'S UNION to continue the project at Bronx Lebanon Hospital and Farberware for the year.**
1994-1997	**Re-funded by the U.S. Department of Education/National Workplace Literacy Program to conduct the project with the original two companies - Bronx Lebanon Hospital and Farberware - and TWO ADDITIONAL companies - KRUYSMAN, INC. and COX & COMPANY, INC.**

THE BUSINESS PARTNERS

BRONX LEBANON HOSPITAL - one of the largest hospitals in the Bronx with 3,000 employees and community facilities throughout the borough.

FARBERWARE, INC. - a Bronx manufacturer of cookware and small appliances located in the Bronx for over 90 years with 750 employees and an international reputation.

KRUYSMAN, INC. - a manufacturer of binders, accordion folders, customized cloth, paper and cardboard products in lower Manhattan with 250 employees.

COX & COMPANY, INC. - a company in lower Manhattan with 170 employees which manufactures de-icing equipment and other technical devices for the aeronautical industry, internationally.

Bronx-Lebanon Hospital Center

- 626 bed hospital
- located in the South Bronx
- 3500 employees
- 3 Major Unions
  - Local 1199
  - NYSNA
  - CIR
- Over 30 off-site health care centers.

The Three C's of Health Care

Customers

Competition

Change

TRAINING LOCATIONS

METHADONE MAINTENANCE
TREATMENT CENTER

ALCOHOL OUTPATIENT CLINIC

SUBSTANCE ABUSE INPATIENT UNITS

PRIMARY CARE CLINICS
(Train the Trainer)

FOCUS OF TRAINING
CUSTOMER SERVICE

- CUSTOMER AND HUMAN RELATIONS
- CULTURAL DIVERSITY
- TELEPHONE COURTESY
- INTER/INTRA DEPARTMENTAL COMMUNICATIONS
- REGISTRATION IN-TAKE PROCEDURES

CURRICULUM FOR SUPERVISORY WORKPLACE TRAINING

TOPICS

- ✔ Studying and selecting needs assessment techniques
- ✔ Studying inputs into a curriculum model
- ✔ Understanding and selecting training methodologies
- ✔ Applying psychological principles applicable to adult learners
- ✔ Planning instruction
- ✔ Selecting and developing training materials
- ✔ Delivering training

PARTICIPANTS' CURRICULUM TOPICS

- Improving Workplace Communication Skills
- Planning Meetings Than Work
- Improving Registration Procedures
- Handling The Telephone In The Workplace
- Understanding and Managing Cultural Diversity In The Workplace
- Improving Dental In-Take Procedures
- Improving Inter/Intra-Departmental Workflow In Selected Department/Units
- Understanding HMO's at Bronx-Lebanon
- Mentoring: The Helping Relationship
- Performance Appraisal

Curriculum for Supervisory Workplace Training

No. Sessions	Topics
1½	**Studying and selecting needs assessment techniques**

- Interview
- Survey
- Questionnaire
- Discussion
- Observation
- Feedback via employees' performance evaluation
- Self-Examination
- Directive (s) from management
- Participants' assessment of workplace skills
- Technological, procedural, and demographic changes

1½ **Studying inputs into a curriculum model**

- Who is to be trained and by whom?
- What is to be taught? (Common focus)
- What delivery systems, equipment, and materials are to be used?
- When should training begin-duration, frequency, length?
- When should training be conducted?
- Where should training be held?
- Who should evaluate training?
- What evaluation techniques should be used?
- How often should training be conducted?

2 **Understanding and selecting training methodologies**
Strengths and weaknesses of:

- Lecture
- Role Play
- Case Study
- Committee Project
- Grouping (deliberative vs. democratic)
- Independent work
- Computer assisted instruction

And

Applying psychological principles applicable to adults learners

6 **Planning instruction**

- Applying learning domains (cognitive, psychomotor, affective)
- Studying components of training guide (lesson plan)
- Writing performance objectives
- Selecting appropriate tools to evaluate training

And

Selecting and developing training materials

4 **Delivering training (30-minute video taped presentations)**

MAKING WORKPLACE TRAINING WORK

- Establish "synergetic" buy-in to ensure organizational support by including management and employees in planning the training experience from the very beginning, e.g., needs assessment; curriculum focus and development; goals; date, time, location, length of training; instructional modalities; formative and summative evaluation criteria and methods

- Customize the curriculum by using job-specific materials but adapt materials to the ability, interests, and needs of participants

- Establish clear goals that are consonant with interests of participants

- Apply principles of effective adult education practice

- Develop a pleasant, supportive, friendly, and conductive training environment based on mutual respect and confidence

- Serve as a facilitator of knowledge/information rather than a disseminator

- Use a variety of collaborative instructional modalities to enhance both literacy and workplace specific skills and knowledge

- Extrapolate ideas/suggestions from summative evaluations of daily instruction to revise and modify on-going instruction and to instruct future planning

- Consider participants with same job title or those from the same unit or department

- Aim for participants with different skills, abilities, and experiences to enrich instruction

- Provide opportunities for participants to apply and transfer what they learn (and practice) in training to their particular work situations/environments and allow time for feedback to the group

- Build in opportunities to allow participants to conduct future training; e.g., train the trainer

- Install the idea that further education and training must be a continuous, on-going journey for personal satisfaction and professional growth and development